i95Dev Magento GP Connect
User Manual – 'Gold Edition'

Version 2.0

i95Dev

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i95Dev Magento GP Connect User Manual - Gold

Magento is a different entity that falls under eCommerce software where as Microsoft Dynamics GP is another kind of entity that falls under stand-alone ERP unlike Magento. i95Dev Magento-GP Connect is an extension that's developed under the i95Dev Research & Development which helps to integrate these two entities i.e. Magento & Dynamics GP.

As there is no easier way to directly integrate these two i.e. Magento & Dynamics GP, a Comprehensive Customization tools are invented to enable .Net developers to create a real-time, transactional connections between Magento & Microsoft Dynamics Great Plains to expand a potential for new features and functionality.

i95Dev GP Connect Extension Gold version supports the following Features:

I. Customer Sync
II. Inventory Update
III. Customer Order Data Sync
IV. Customer Offline Update
V. Order Offline Update

i95Dev Magento GP Connect User Manual:

The following User Manual document helps the Gold users in knowing much about the features and the way it works. It also educates the users to know the in depth of each and every functional feature

Customer Creation from Magento Admin

Menu Navigation:

- Open **Magento Admin**
- Login to the Admin Panel
- Navigate to **Customers→ Manage Customers**
- Click on **Add New Customer**
- It navigates to **New Customer**
- Provide Customer Details
- Set **Associate to Website = Main Website**
- All the mandatory fields must be provided as shown in the following figure

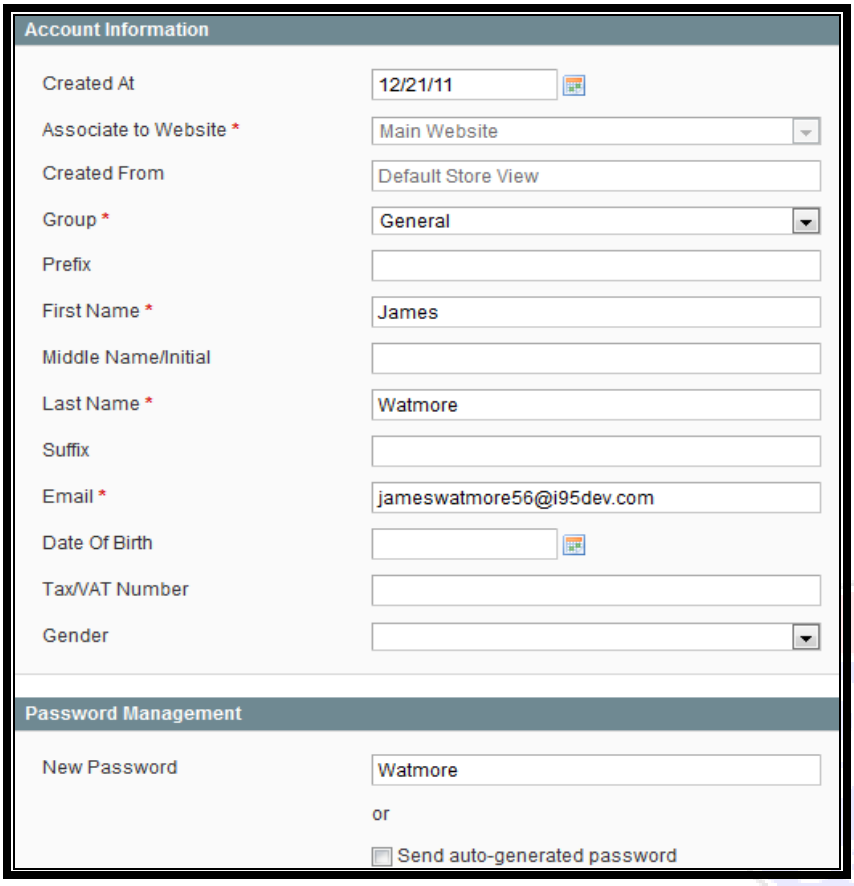

Fig: Creating a Customer from Magento Admin

- Provide the Billing & Shipping addresses of a Customer
- Click **Addresses** which is on the left side under **Customer Information** column
- Click **Add New Address**
- Provide the required Address Details such as *First Name, Last Name, Street Address, etc*
- You have an option to select the current address that you entered as Default Billing Address or Default Shipping Address by selecting the radio buttons as shown in the following screen

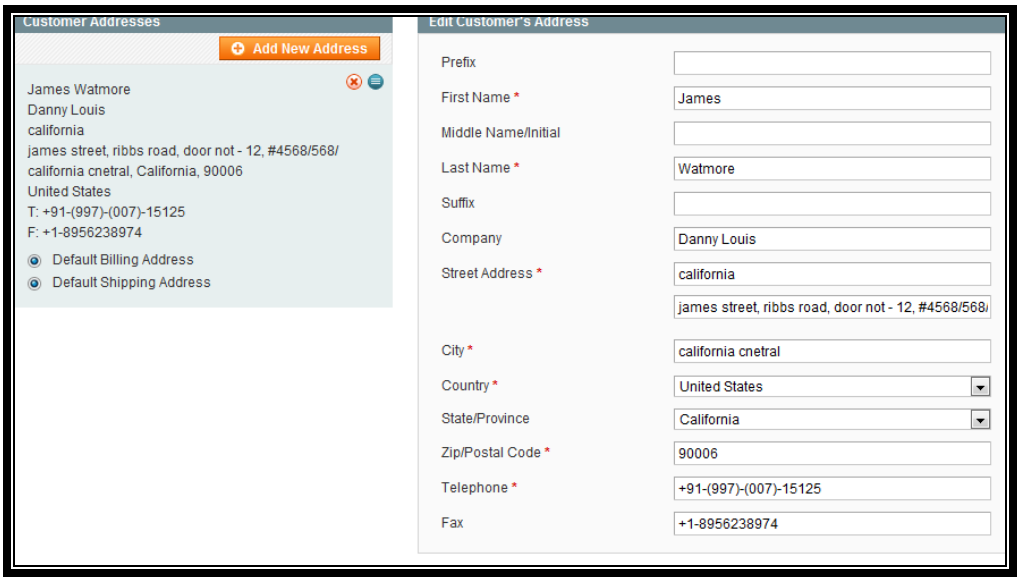

Fig: Creating Customer Address & Selecting Default Billing/Shipping Address

- Click **Save Customer**
- The Customer gets created in **Microsoft Dynamics GP** with the **GP Customer ID**. In other words, once the customer is created in Magento, it also creates the same customer in Dynamics GP and a **Customer ID** from Dynamics GP is sent to Magento in order to identify that particular customer at Magento. You can see the GP Customer ID in the following figure

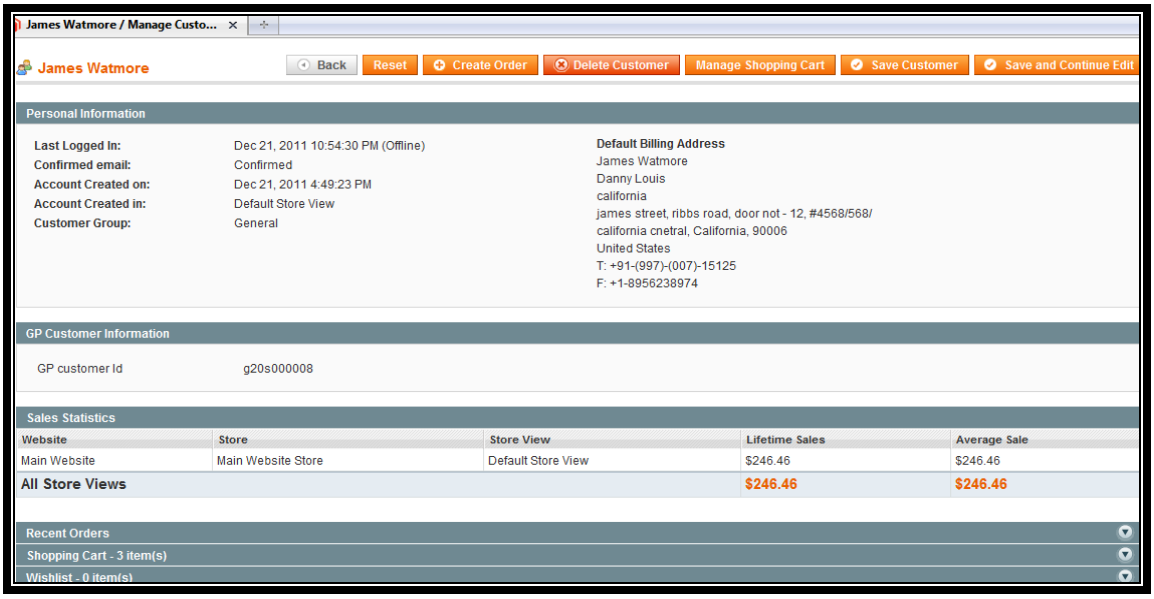

Fig: Customer with saved Addresses

In order check back the **Customer Creation** in **Dynamics GP**, Please follow the navigation

Menu Navigation:

- Open **Dynamics GP**
- Navigate to **Sales→Customer** under **Cards** Section
- Click on **Look Up** button for a particular **Customer ID**
- Select a particular **Customer ID** from the look up window
- **Customer Maintenance** window gets popped up with **Customer Details** in Dynamics GP as shown in the following figure

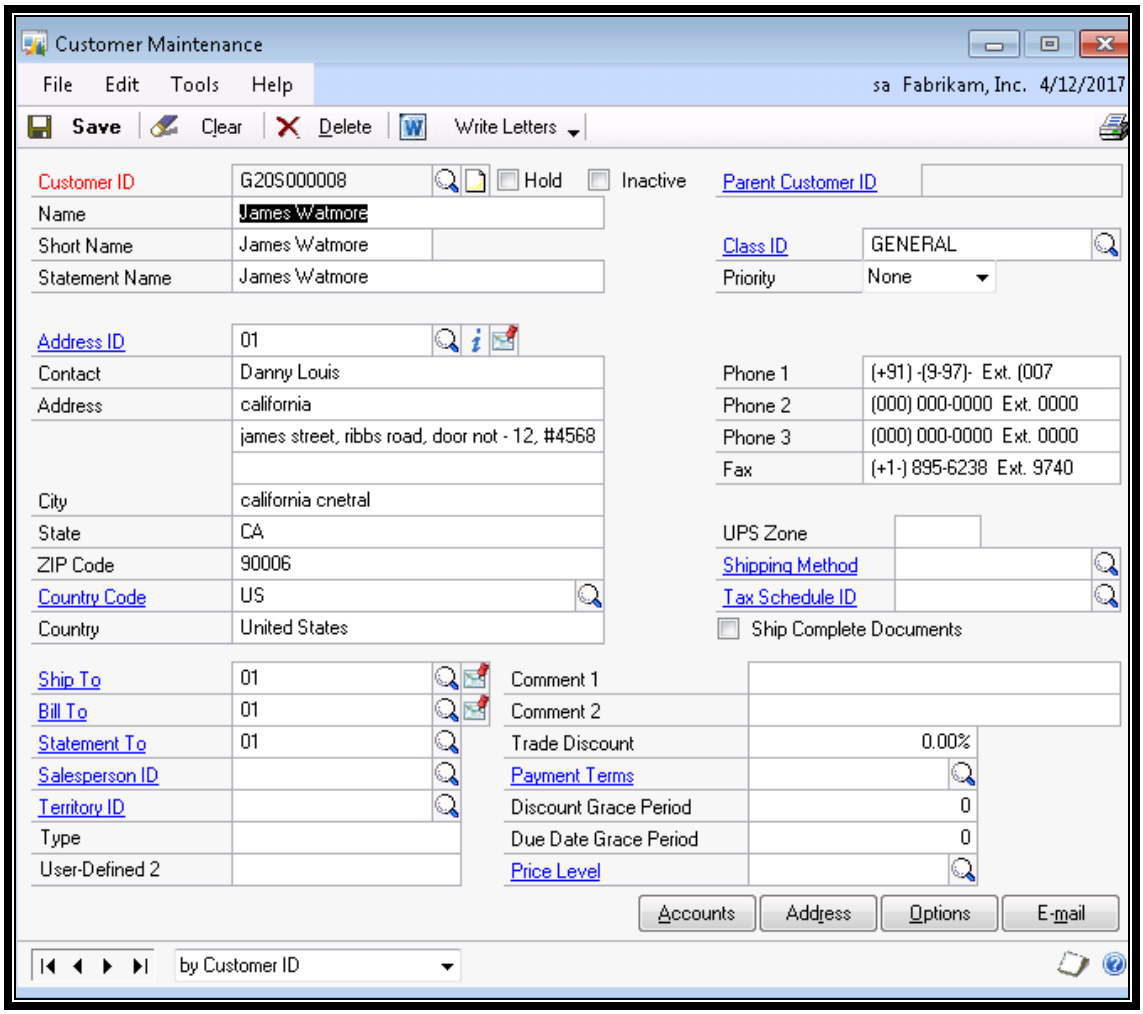

Fig: Customer Created in Microsoft Dynamics GP

- **i95Dev GP Connect** Extension provides the flexibility to Create Customer in different ways:

  Customers can be created:

  - Without Shipping & Billing Addresses
  - Either With Shipping or Billing address
  - Either With Same or Different Shipping and Billing Addresses
  - With Multiple Addresses

Customer Update from Magento Admin

Menu Navigation:

- Open **Magento Admin**
- Login to Admin Panel
- Navigate to **Customers → Manage Customers**
- Select the existing customer and modify the customer details as per your requirement
- Open the required **Customer**
- Click **Account Information** which is on the left side under **Customer Information** column
- Edit the Customer Details as shown in the following figure

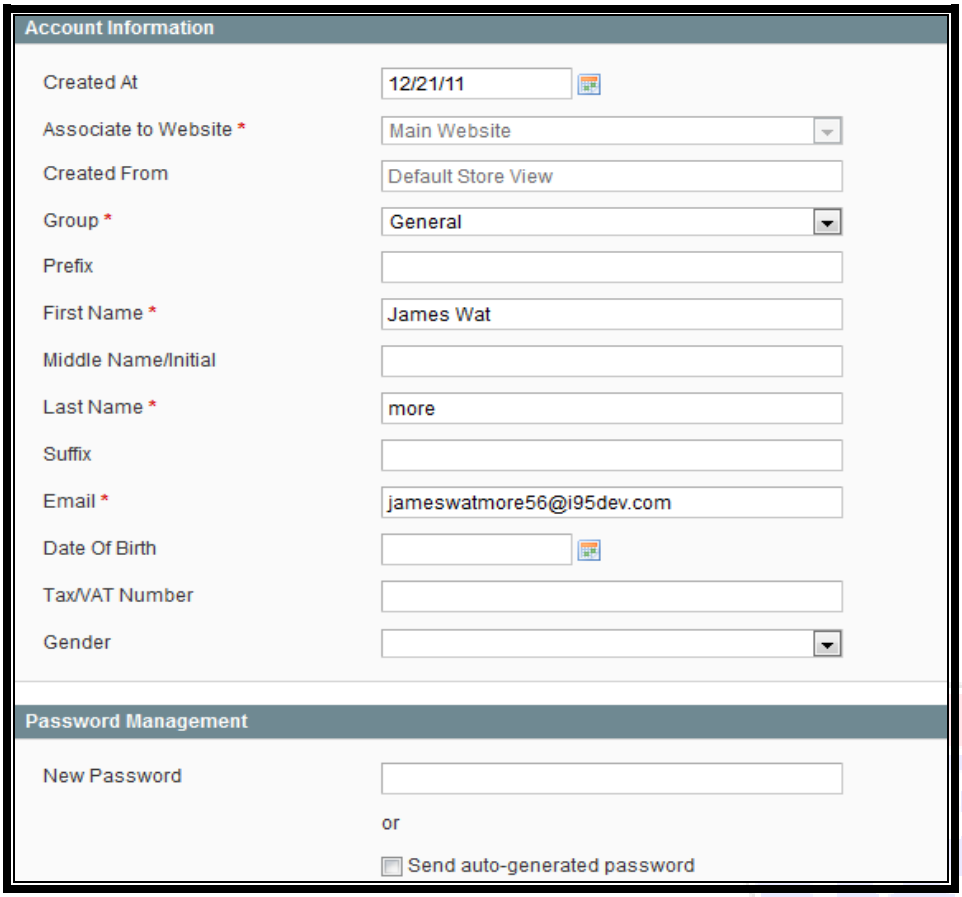

Fig: Updating the Existing Customer Details

- Update the **Billing & Shipping Address** details of customer

- You also have an option to update different addresses that you have saved earlier
- You can also edit the **Default Billing & Shipping Addresses** by selecting radio buttons as shown in the following figure

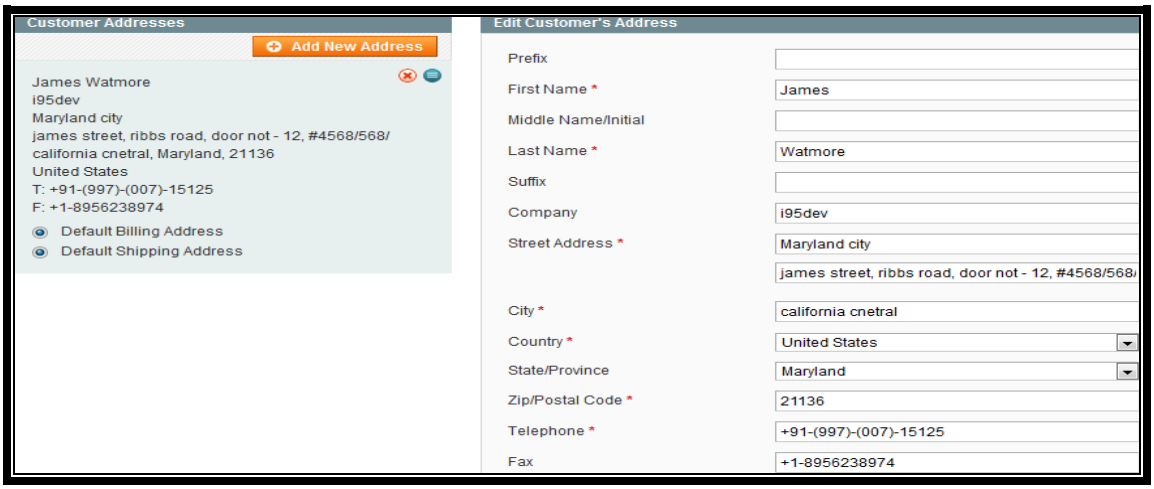

Fig: Updating Customer Addresses

- Click **Save Customer**
- The updated **Customer Information** also gets updated in **Dynamics GP**
- The **Customer Information** gets updated in **Magento** as shown in the following figure

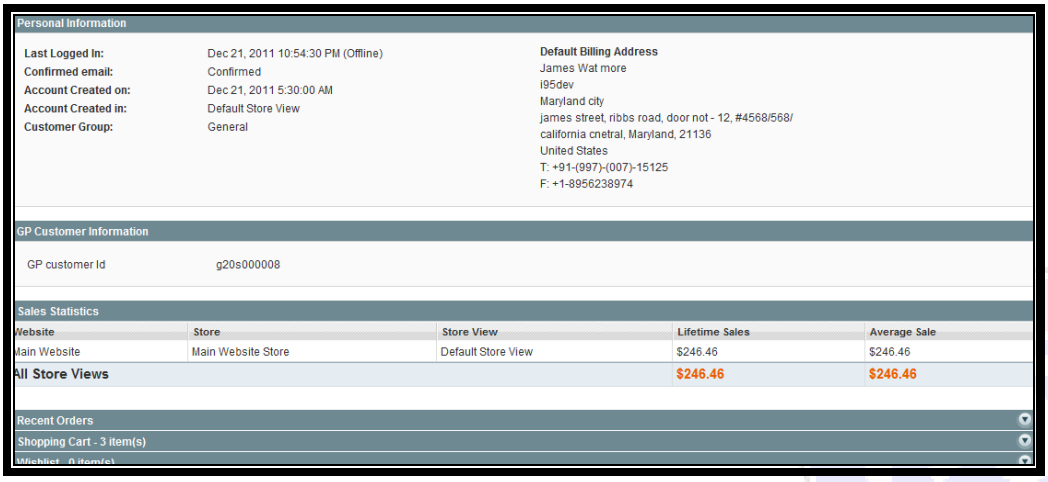

Fig: Updating the Existing Customer

In order to check back the **Customer Creation** in **Dynamics GP**, please follow the navigation

Menu Navigation:

- **Open Dynamics GP**
- **Sales→Customer** under **Cards** Section
- Click on **Look up** button for **Customer ID**
- Select **Customer ID** from the look up window
- **Customer Maintenance** window gets popped up with Customer Details in Dynamics GP as shown in the following figure

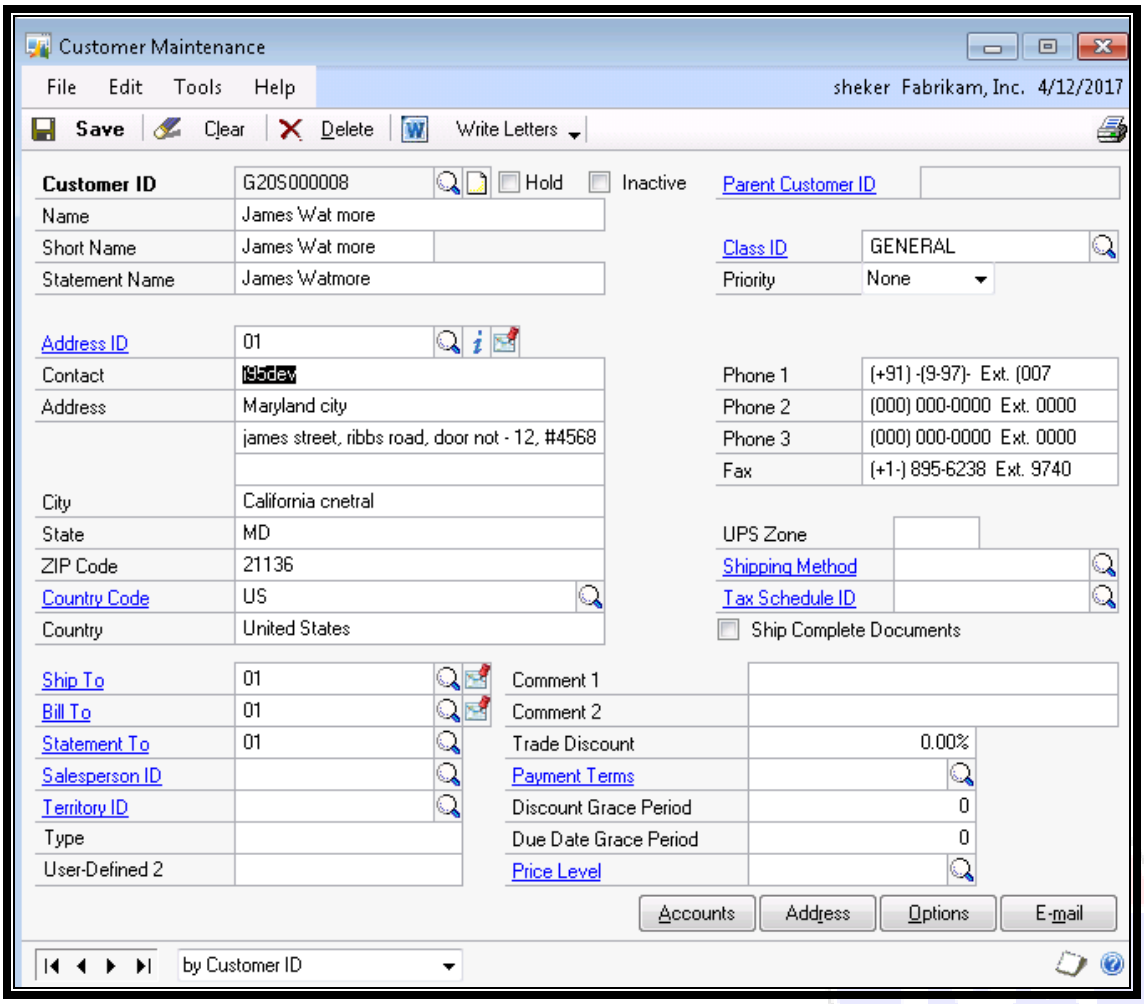

Fig: Updated Customer Information in Microsoft Dynamics GP

- **i95Dev GP Connect Extension** provides the flexibility to update customer in different ways:

Customers can be created:

- Without Shipping & Billing Addresses
- Either With Shipping or Billing address
- Either With Same or Different Shipping and Billing Addresses
- With Multiple Addresses

Customer Creation from Magento Front End

Menu Navigation:

- Open **Magento Store**
- Navigate to **Login**
- Click on **Create an Account** button
- Fill the **Customer Details** and Click on **Submit** as shown in the following figure

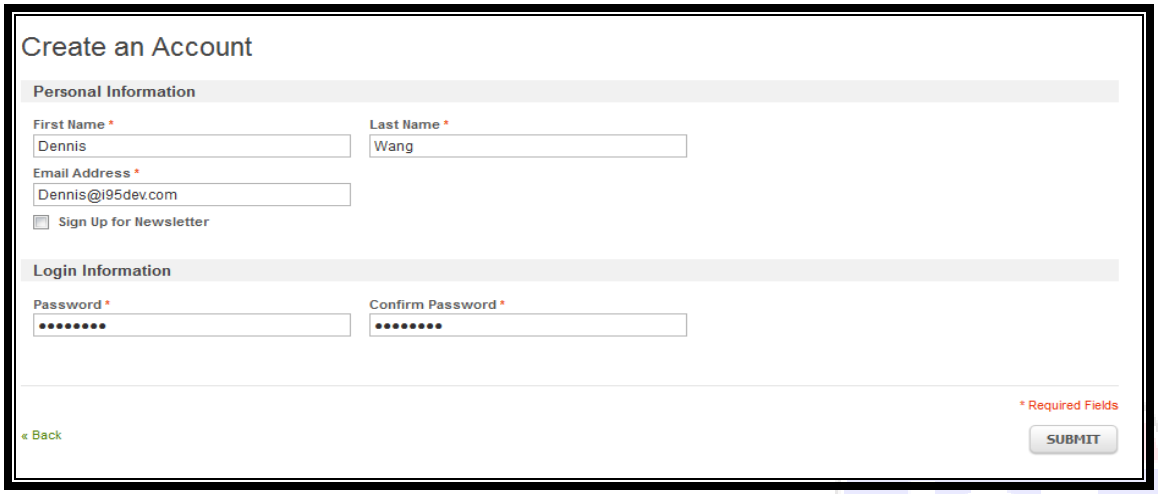

Fig: Customer Creation from Magento Front End

- Once the submit button is clicked, the Customer gets created in Microsoft Dynamics GP with a specific **GP Customer ID**

In order to check back the **Creation of Customer** that you did from Magento in **Dynamics GP**,

Please follow the navigations

Menu Navigation:

- Open **Dynamics GP**
- Navigate to **Sales → Customer** under **Cards** section
- Click on **Look Up** button for **Customer ID**
- Select **Customer ID** from the look up window
- **Customer Maintenance** window gets popped up with Customer details in **Dynamics GP**

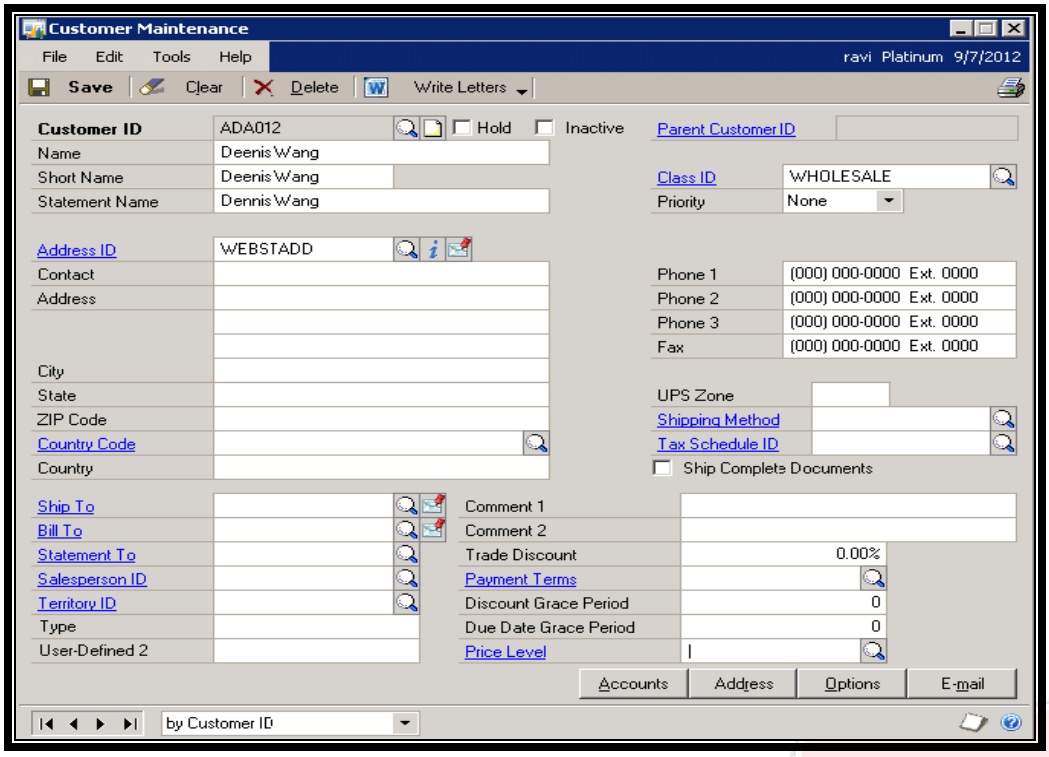

Fig: Customer Created in Microsoft Dynamics GP

- You can also view the email address that you provided in Magento over Dynamics GP
- Click the '**i**' icon which is next to the **Address ID** that pops an Internet Information window

- You will see the email address as shown in the following figure

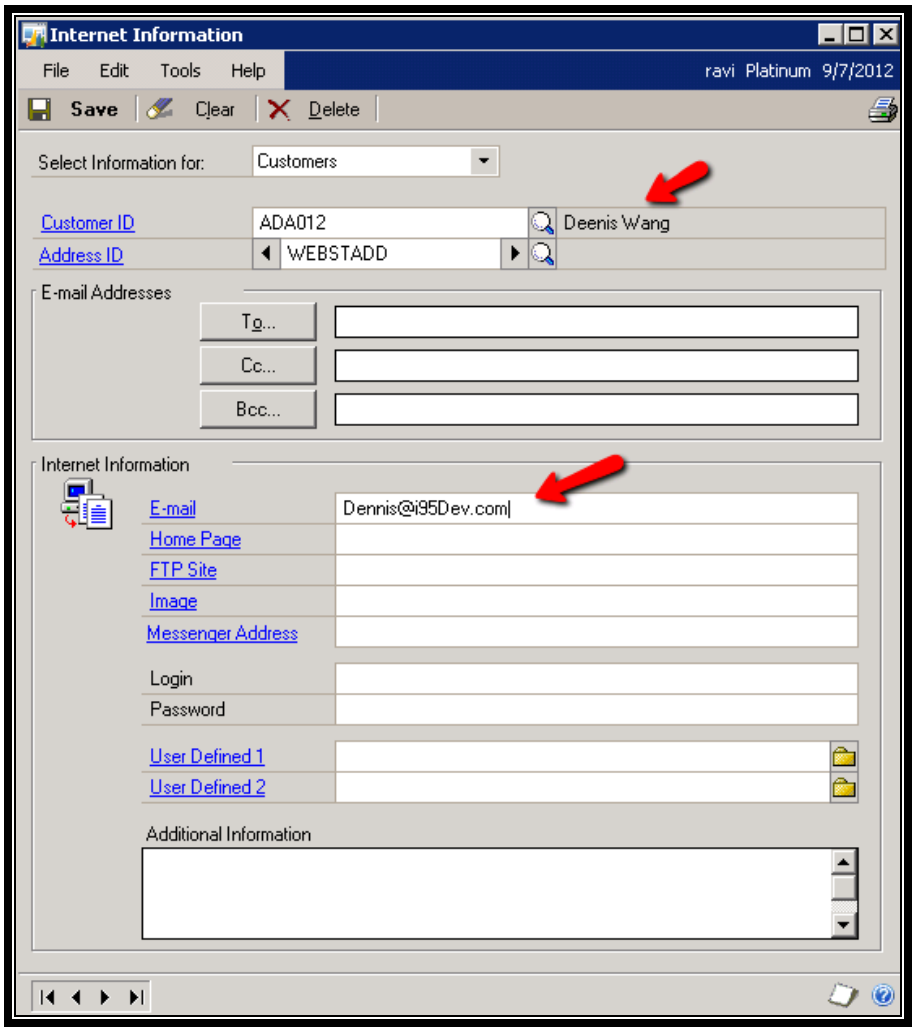

Fig: eMail Address Created in Microsoft Dynamics GP

Creating Customer with Billing & Shipping Address from Magento Front End

Menu Navigation:

- Open **Magento Store**

- Navigate to **Register**
- It navigates you to the next screen i.e. **Create an Account** page as shown in the following figure
- Provide required information such as **First Name, Last Name, Email Address, Password, etc.**
- Click on **Submit** button

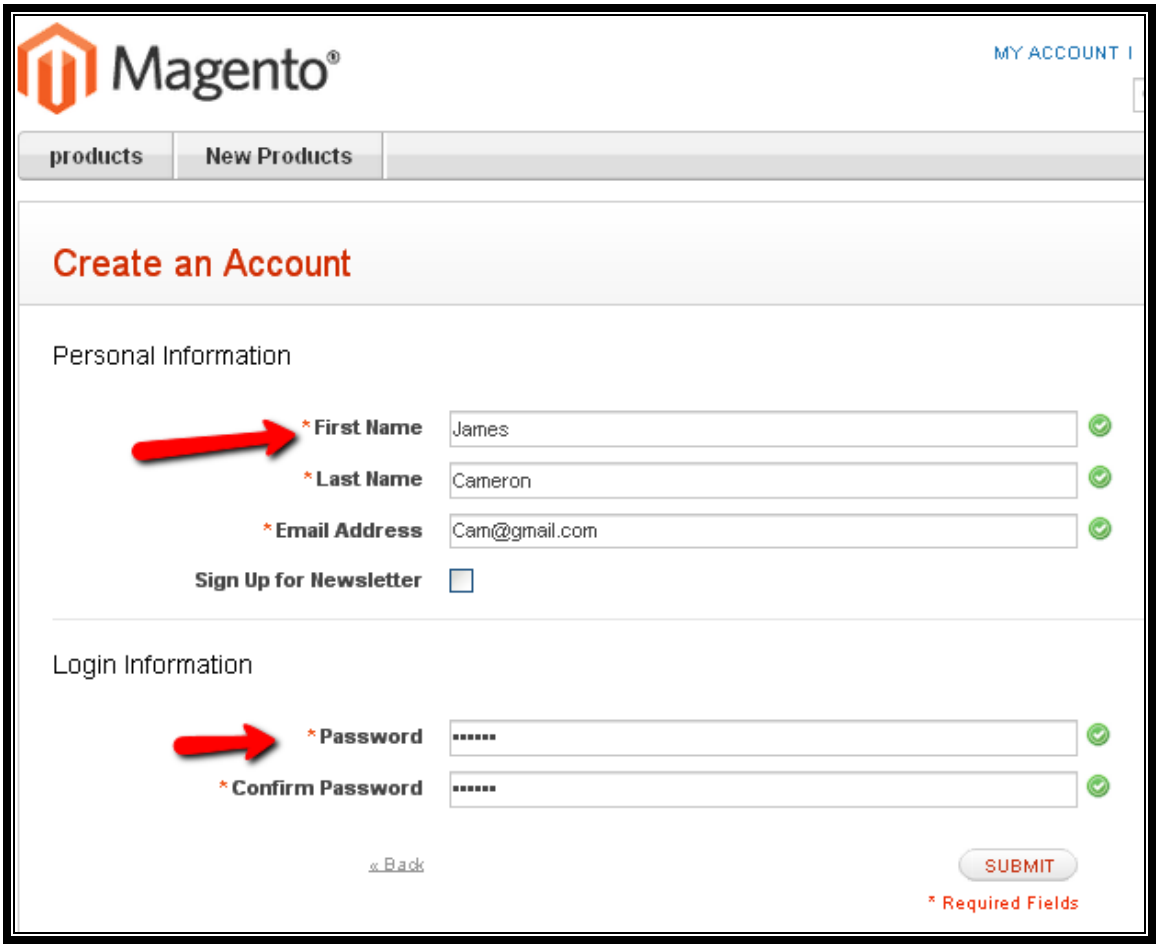

Fig: Customer Creation from Magento Front End

- Once you click the submit button, it navigates to **My Dashboard** page as shown in the following figure

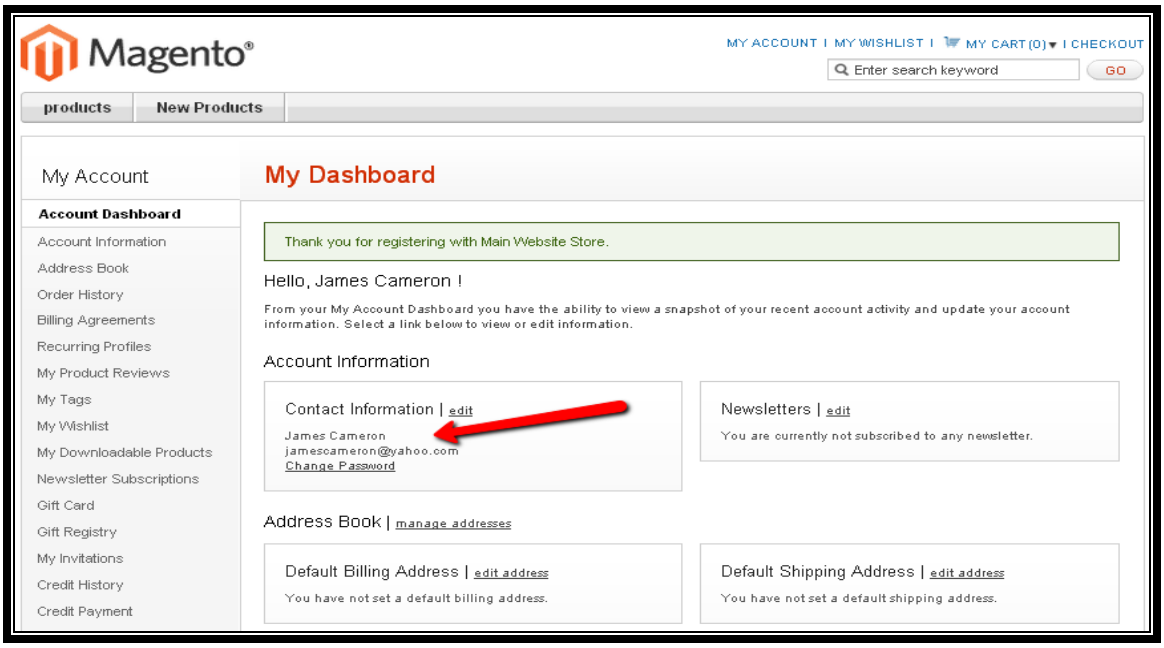
Magento
MY ACCOUNT | MY WISHLIST | MY CART (0) | CHECKOUT
Enter search keyword
GO
products
New Products
My Account
Account Dashboard
Account Information
Address Book
Order History
Billing Agreements
Recurring Profiles
My Product Reviews
My Tags
My Wishlist
My Downloadable Products
Newsletter Subscriptions
Gift Card
Gift Registry
My Invitations
Credit History
Credit Payment
My Dashboard
Thank you for registering with Main Website Store.
Hello, James Cameron !
From your My Account Dashboard you have the ability to view a snapshot of your recent account activity and update your account information. Select a link below to view or edit information.
Account Information
Contact Information | edit
James Cameron
jamescameron@yahoo.com
Change Password
Newsletters | edit
You are currently not subscribed to any newsletter.
Address Book | manage addresses
Default Billing Address | edit address
You have not set a default billing address.
Default Shipping Address | edit address
You have not set a default shipping address.

Fig: Customer Creation from Magento Front End

- Click on the **Address Book** that is on the left side under **My Account** column
- You will see the **Default Billing & Shipping Addresses**
- Click the **Add New Address Tab** which is on the right side top as shown in the following figure

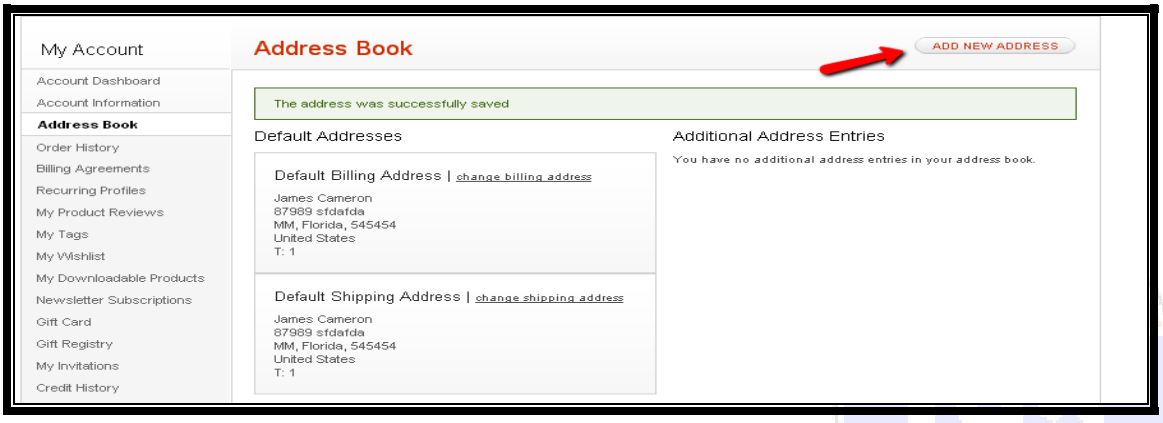

Fig: Adding New Address of a Customer

- It will navigate to the **Add New Address** screen
- Provide the required Address details such as **First Name, Last Name, Address details**
- You can add this new address to **Shipping or Billing address**

- You will have two check marks i.e. **Use as my default shipping address** or **billing address**
- Check mark any one of the two options based on your requirement as shown in the following figure

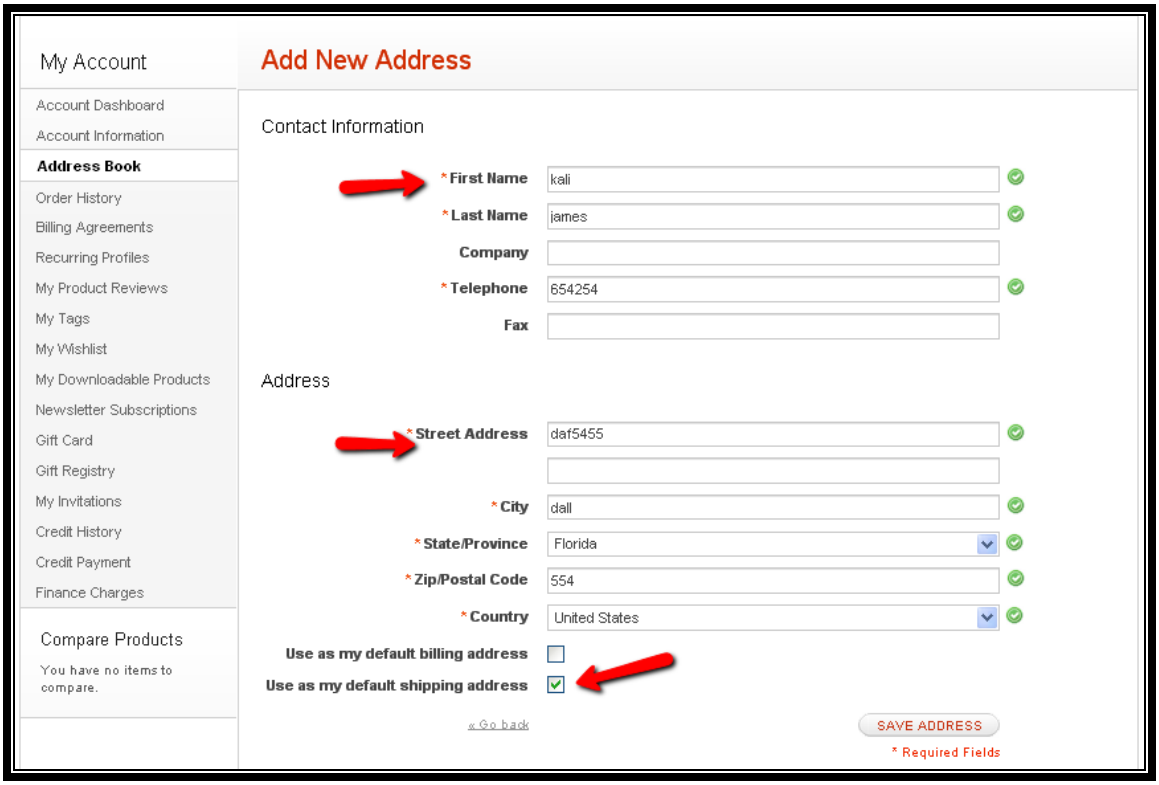

Fig: Default Shipping Address Creation of a Customer

- Click on **Save Address**
- You will see the different addresses for Shipping as well as for Billing addresses as shown in the following figure

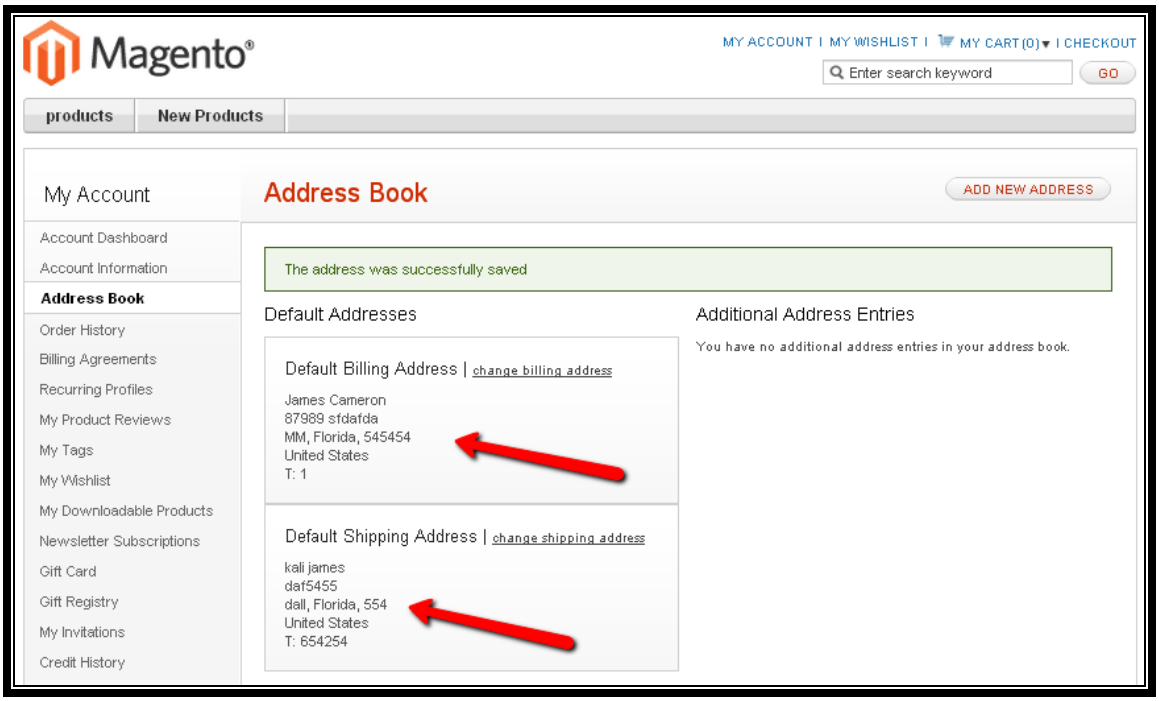

Fig: Different Billing & Shipping Address of a Customer

Order Creation from Magento Admin

Menu Navigation:

- Open **Magento Admin**
- Login to Admin Panel
- Navigate to **Sales→Orders**
- Click on **Create New Order**
- Select the **Customer Name** from the list of customers
- Select **Order Currency** as **US Dollar**
- Click on **Add Products**
- Select the **Products**
- Click on **Add Selected Product(s) to Order**
- Select one of the **Payment Method**

- For Shipping Methods, Click on the **Get Shipping Methods and Rates** link and select one of the method
- Check the **Grand Total**
- Click on **Submit Order**
- Once you click on **Submit Order**, the order gets created in **Microsoft Dynamics GP** with Dynamics **GP Order ID**
- If you able to see the **GP Order ID** at Magento, then it indicates that the order is successfully synced from Magento to Dynamics GP
- **GP Order ID** gets created for every order that is submitted from Magento store as shown in the following figure

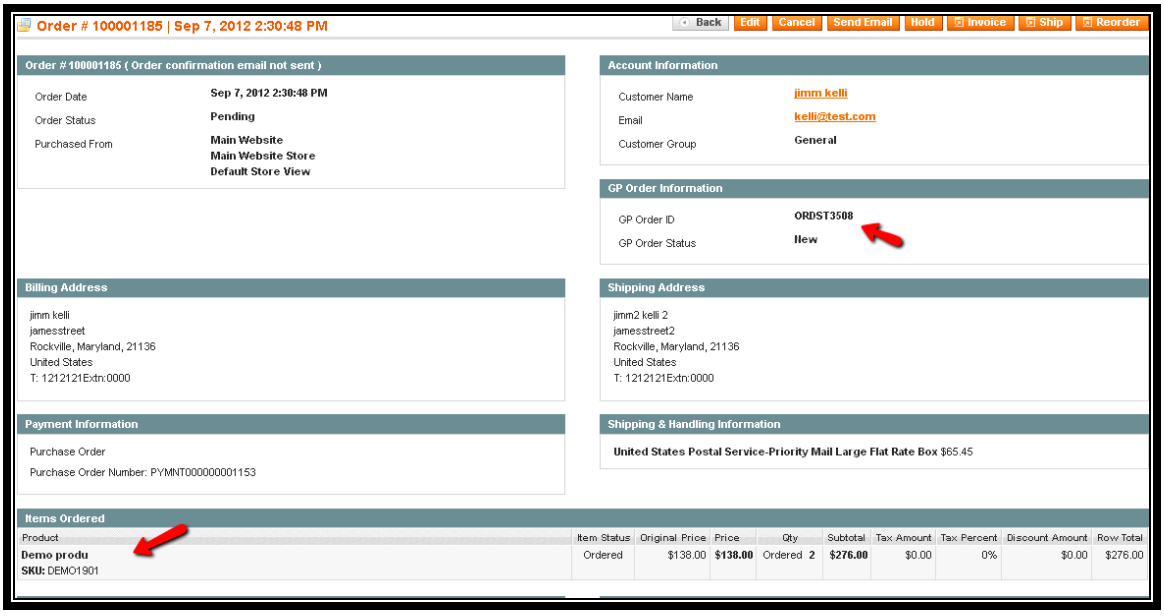

Fig: Order Created from GP to Magento

In order to check back the **Order Creation** in Dynamics GP that's been done from **Dynamics GP**, Please follow the navigations

Menu Navigation:

- Open **Dynamics GP**
- Navigate to **Sales Card→ Sales Transactions Entry** under **Sales** Section
- Select **Type ID** as **Order**

- Click on **Look Up** button for **Document No**
- Select **Order ID** from look up window
- **Sales Transaction Entry** window gets popped up with Order details in GP as shown in the following figure
- i95Dev GP Connect Extension has the flexibility to submit **Order with New and Existing Customer**

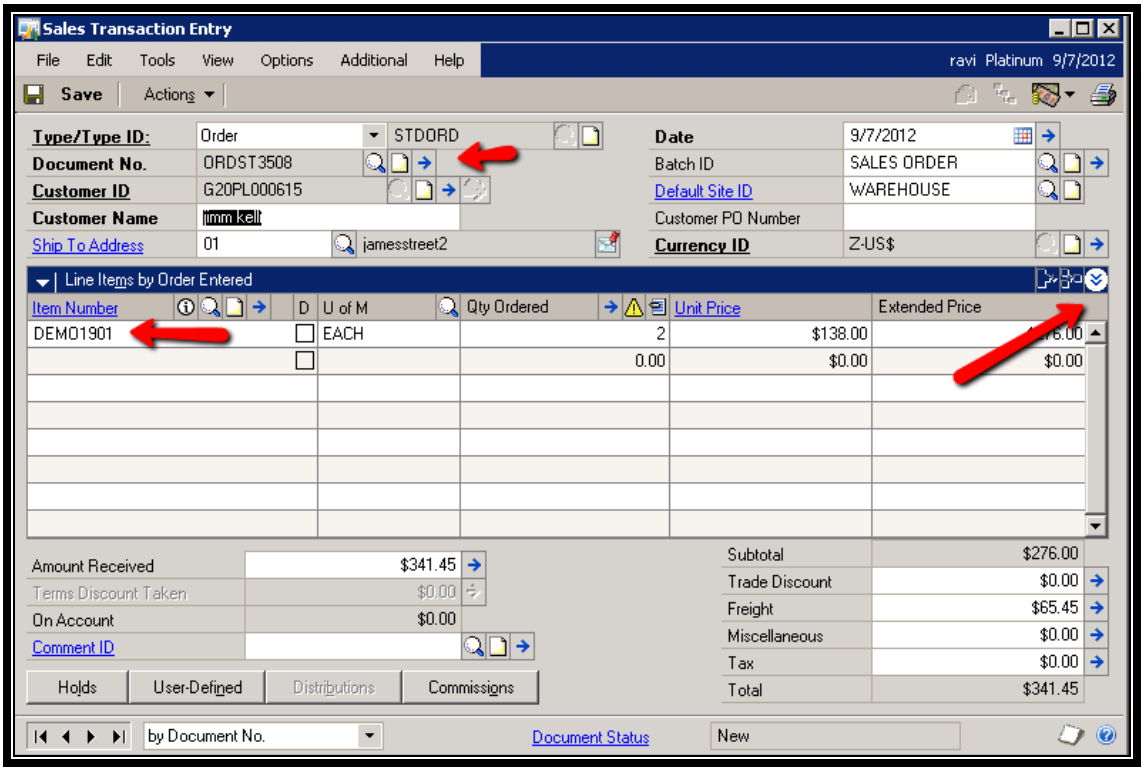

Fig: Order Created in Microsoft Dynamics GP

- In order to view the other details of an Order such as Shipping Method, Click the **Drop Down** as shown in the above picture which is on the right side
- You can view the **Shipping Method** in Dynamics GP that's been selected from Magento as shown in the following figure

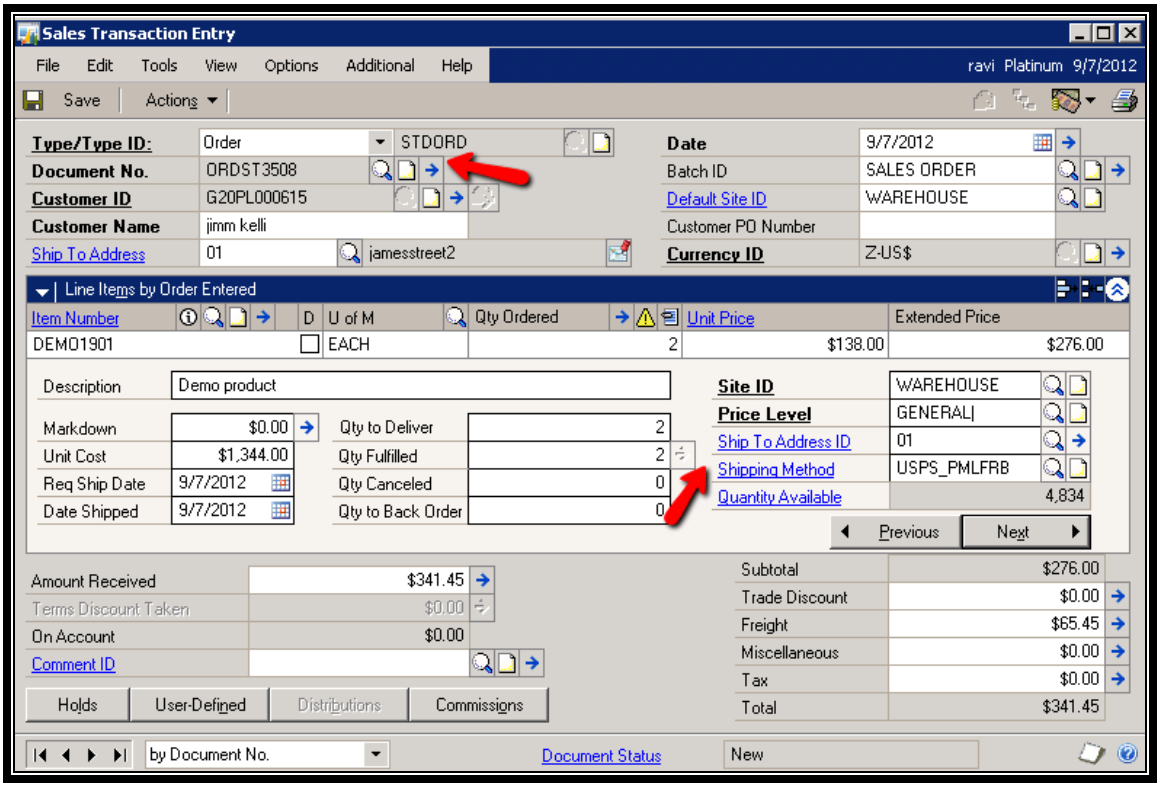

Fig: Shipping Method Creation in Microsoft Dynamics GP

Order Place with Custom Pricing from Magento Backend to GP [Release II]

Menu Navigation:

- Open **Magento Admin**
- Login as Admin
- Select **Sales→Orders**
- Click **Create New Order** as shown in the following figure

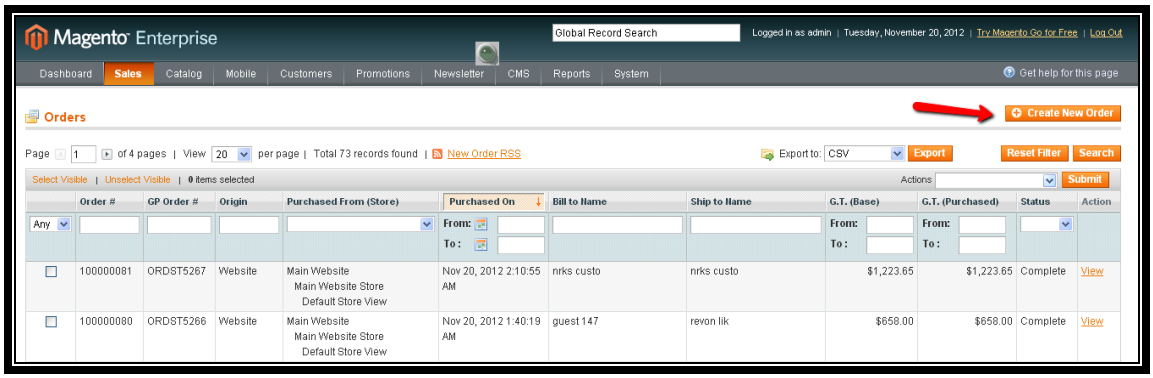
Magento Enterprise
Global Record Search
Logged in as admin | Tuesday, November 20, 2012 | Try Magento Go for Free | Log Out
Dashboard
Sales
Catalog
Mobile
Customers
Promotions
Newsletter
CMS
Reports
System
Get help for this page
Orders
Create New Order
Page 1 of 4 pages | View 20 per page | Total 73 records found | New Order RSS
Export to: CSV
Export
Reset Filter
Search
Select Visible | Unselect Visible | 0 items selected
Actions
Submit
Order #
GP Order #
Origin
Purchased From (Store)
Purchased On
Bill to Name
Ship to Name
G.T. (Base)
G.T. (Purchased)
Status
Action
100000081 ORDST5267 Website Main Website Main Website Store Default Store View Nov 20, 2012 2:10:55 AM nrks custo nrks custo $1,223.65 $1,223.65 Complete View
100000080 ORDST5266 Website Main Website Main Website Store Default Store View Nov 20, 2012 1:40:19 AM guest 147 revon lik $658.00 $658.00 Complete View

Fig: Creating an Order Created in Magento

- You will get a Create New Order page with all the existing Customers
- Select any **Registered Customer** by clicking
- Click on **Add Products**
- Select the products
- Click **Add Selected Products to Cart**
- Check mark the option called **Custom Price**
- Provide the **Price** that you would like to sell the product for, as shown in the following figure

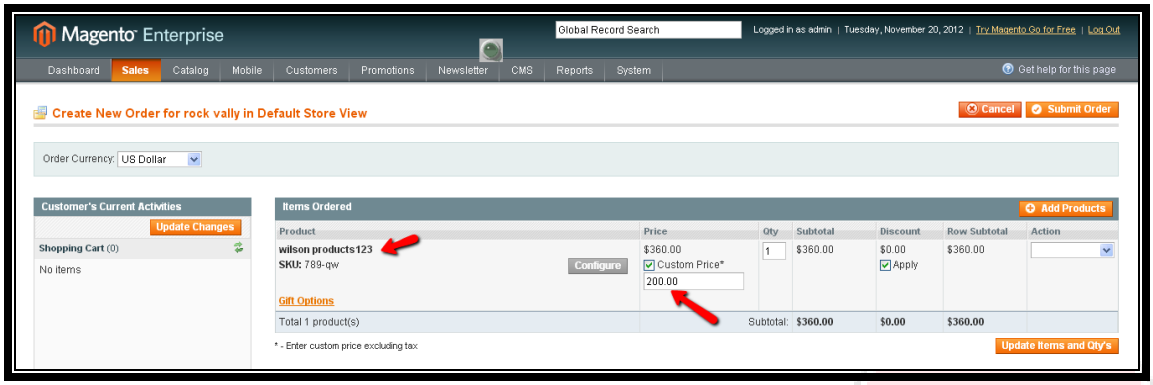

Fig: Providing a Custom Price for a Product

- Click **Update Items & Qty**

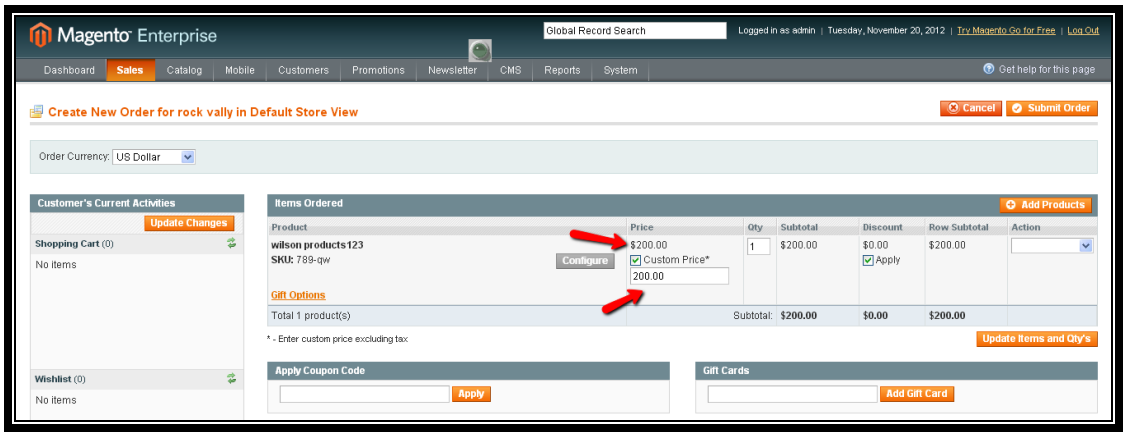

Fig: Added Custom Price to a Product

- Fill the **Billing Address** and **Shipping Address**
- Select the **Payment Information**
- Fill the Credit Card details like, *Name of the card member, Credit Card Number, Expiry Date, CVV code etc.*
- Select any Shipping Method such as UPS/USPS/FedEx & Fill the information
- Click **Place Order** button

Order Creation from Magento Front End

Menu Navigation:

Note: Assuming that the Customer is already logged in to the Magento Store

- Open **Magento store**
- Navigate to **Products Menu → Select Product(S) → Add to Cart**
- Click on **Proceed to Checkout** button over the next screen
- Login with customer credentials created earlier
- Or else register as a new customer if you did not register earlier
- Select **Billing & Shipping Addresses** & Provide the required details
- Select one of the **Shipping Methods** and Continue
- Select **Payment Information** and continue
- Click on **Place Order**

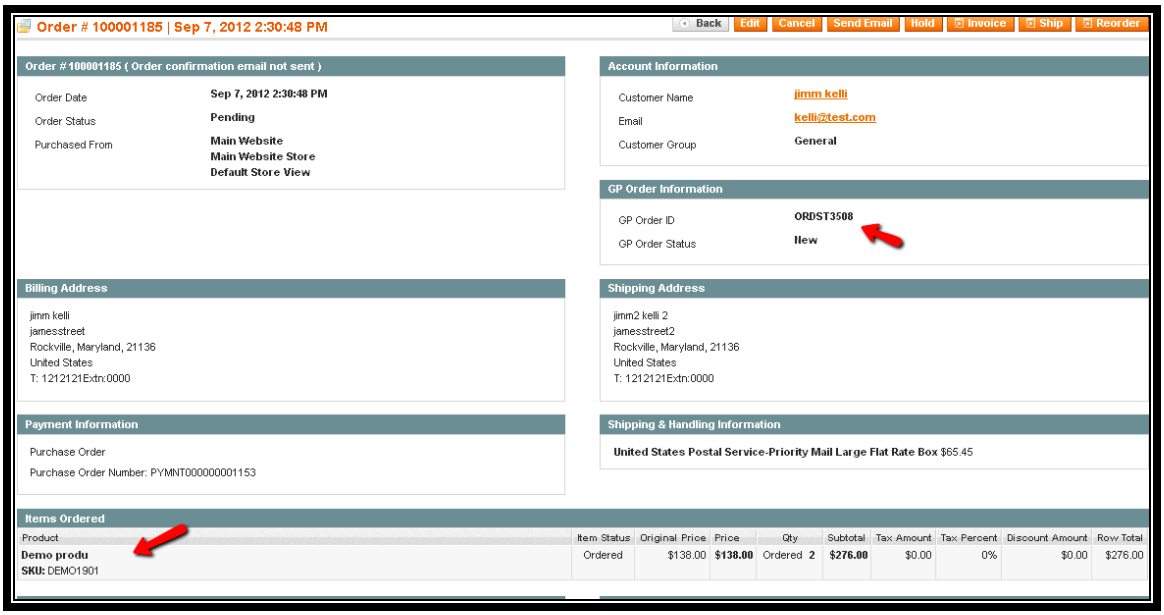

Fig: **Viewing Order Creation from Magento Back End**

- **GP Order ID** gets created for every order that is submitted from Magento store
- Once the Order is placed in Magento, it also gets created in **Microsoft Dynamics GP** with **GP Order ID** which you can see at Magento as shown in the above figure

In order to check back the **Order Creation** in Dynamics GP that's been done from **Magento Front End**, Please follow the navigation

Menu Navigation:

- Open **Microsoft Dynamics GP**
- Select **Sales Card→ Sales Transactions Entry** under **Transaction** section
- Select **Type ID** as **Order**
- Click on **Look Up** button for **Document No**
- Select **Order ID** from loop up window
- **Sales Transaction Entry** window gets popped up with Order details in GP as shown in the below figure

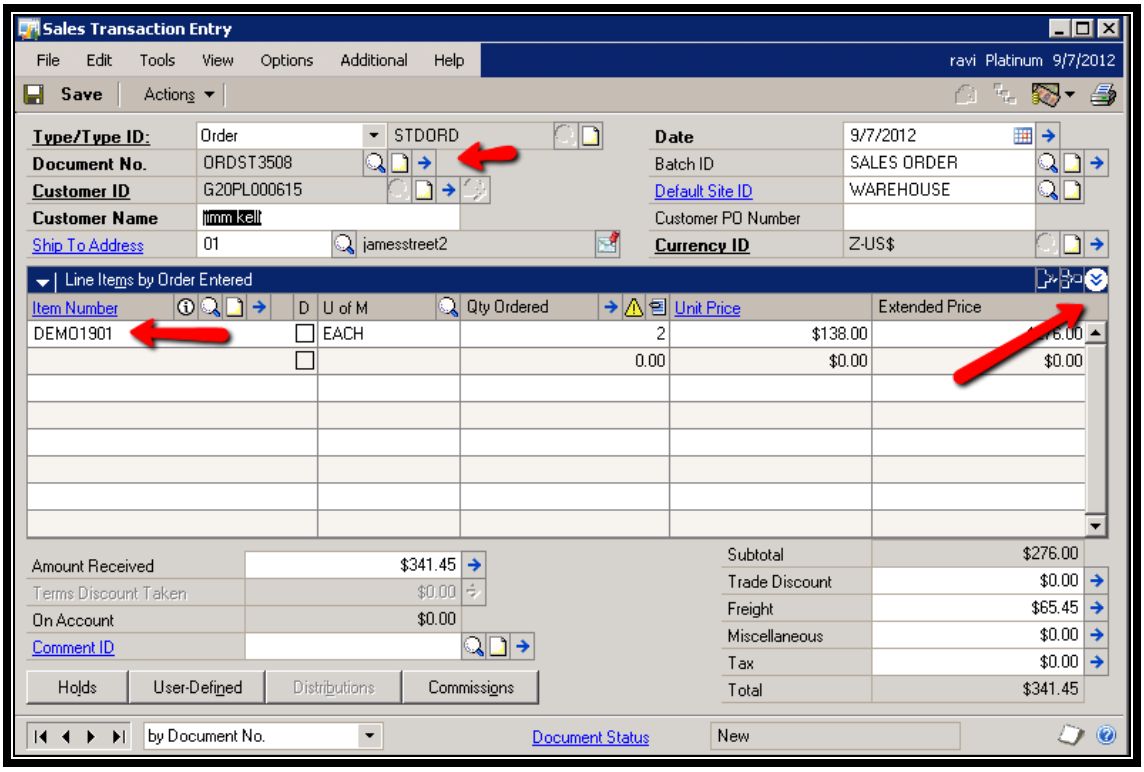

Fig: Order created in Microsoft Dynamics GP

Magento Admin Offline Order Update

In case of any interruptions happened such as failure of any server or server going down, there is always a chance of Microsoft Dynamics GP going down which will drop the connection that's been there between Magento and Dynamics GP. This indeed would make online Orders to fail in syncing. In that particular scenario we provide an option called '**Offline Order Sync'** that allows admin to manually sync the orders that's been placed from **Magento to GP**

Menu Navigation:

- Open **Magento Admin**
- Login Admin Panel
- Click on **Sales → Order**
- If the particular Order is not synced to Dynamics GP, then you will see the following figure with two options i.e. **GP Sync** & **Manual Sync**

- You can directly select the **GP Sync** radio Button & Click on **Submit** button
- In case, if there is a chance of having the same Order in Dynamics GP with which you would like to sync with the Order that's been in Magento, then you have to do a manual sync
- Select the **Manual Sync** radio button & Click on **Submit** button

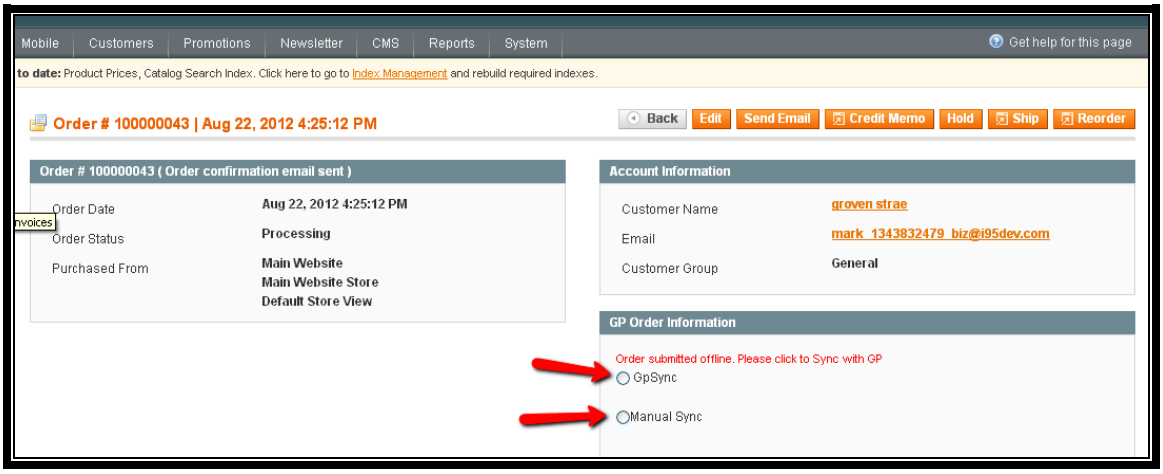

Fig: Offline Order Sync from Magento to Microsoft Dynamics GP

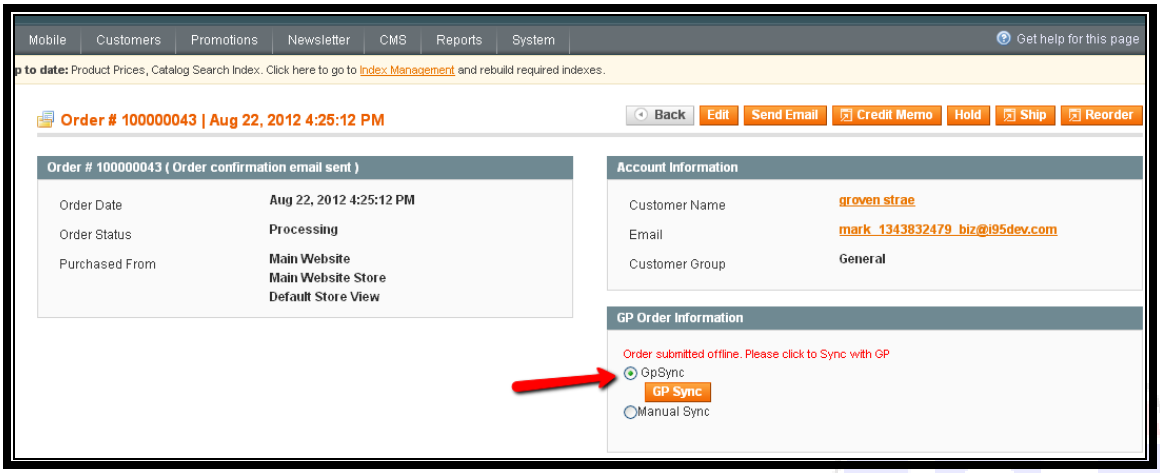

Fig: Offline Order Sync from Magento to Microsoft Dynamics GP

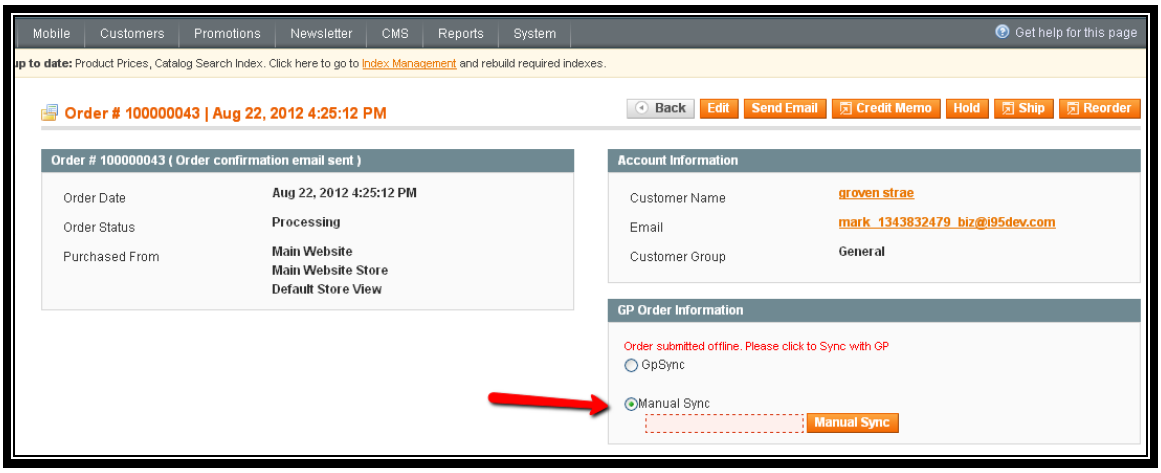

Fig: Manual Offline Order Sync from Magento to Microsoft Dynamics GP

- Once, the order is successfully synced and created in Dynamics GP then the **GP Order ID** is sent back to Magento which indicates a successful creation of that particular order in Dynamics GP

  In order to check back the **Offline Order Creation** in Dynamics GP that's been done from **Magento Front End/Back End**, Please follow the navigation
  Menu Navigation:

  - Open **Dynamics GP**
  - Navigate to **Sales Card → Sales Transactions Entry** under **Transaction** Section
  - Select **Type ID** as **Order**
  - Click on **Look Up** button for **Document No**
  - Select **Order ID** from look up window
  - **Sales Transaction Entry** window gets popped up with Order details in GP as shown in the following figure

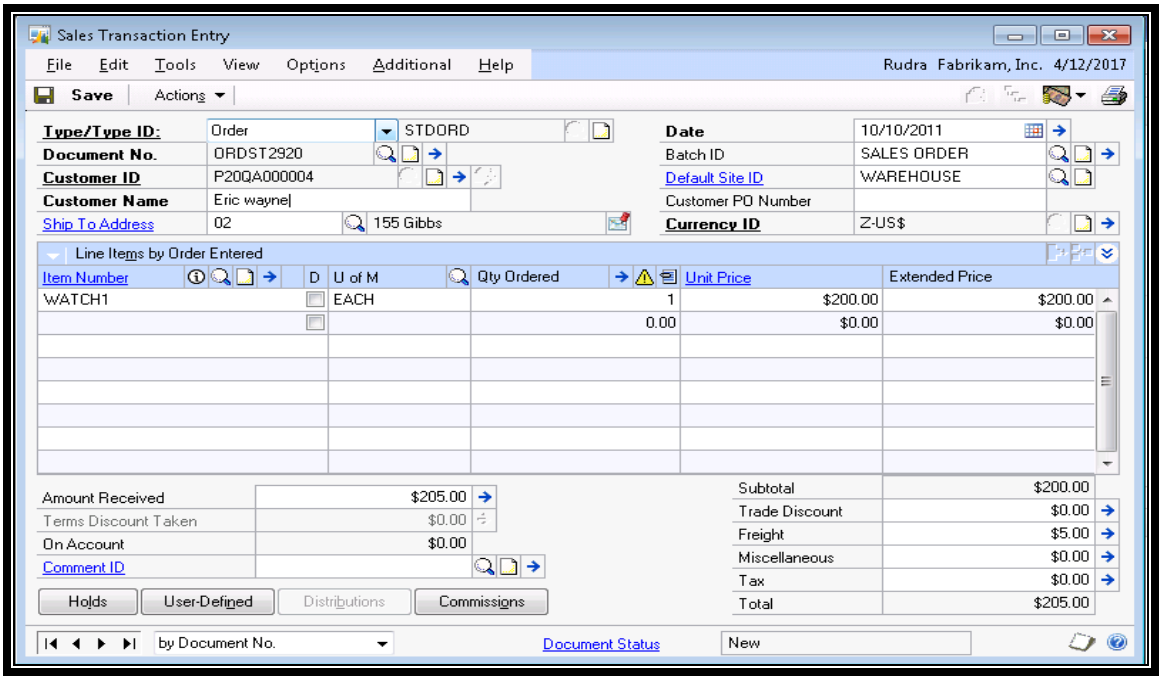

Fig: Offline Order Created in Dynamics GP using Offline Sync process

Magento Admin Offline Customer Update

Menu Navigation:

- Open **Magento Admin**
- Login to Admin Panel
- Click on **Manage Customers**
- If the particular Customer is not synced to Dynamics GP, then you will see the following figure with two options i.e. **GP Sync** & **Manual Sync**
- You can directly select the **GP Sync** radio Button & Click on **Submit** button
- In case, if there is a chance of having the same Customer in Dynamics GP with which you would like to sync with the Order that's been in Magento, then you have to do a manual sync
- Select the **Manual Sync** radio button & Click on **Submit** button

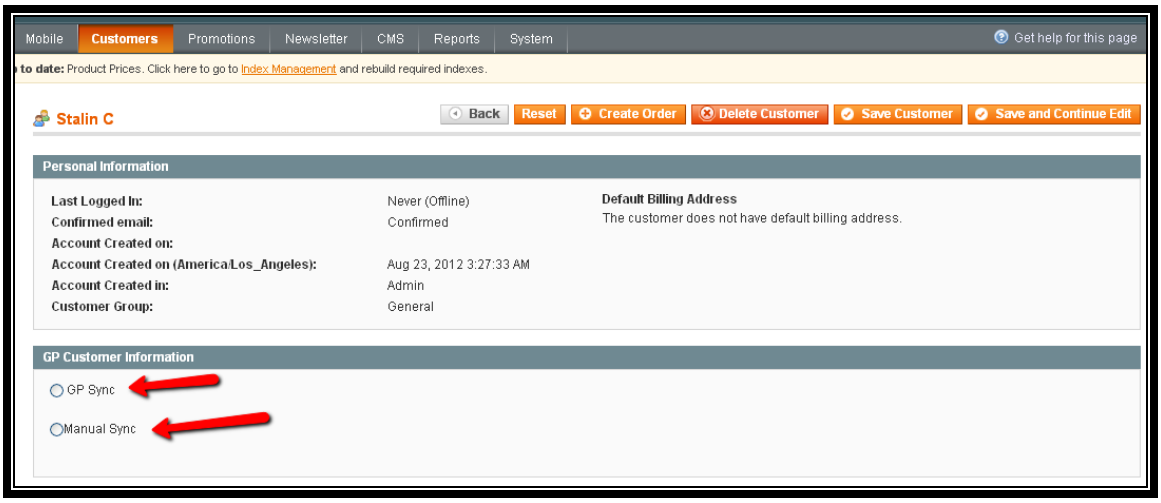

Fig: Offline Customer Sync from Magento to Microsoft Dynamics GP

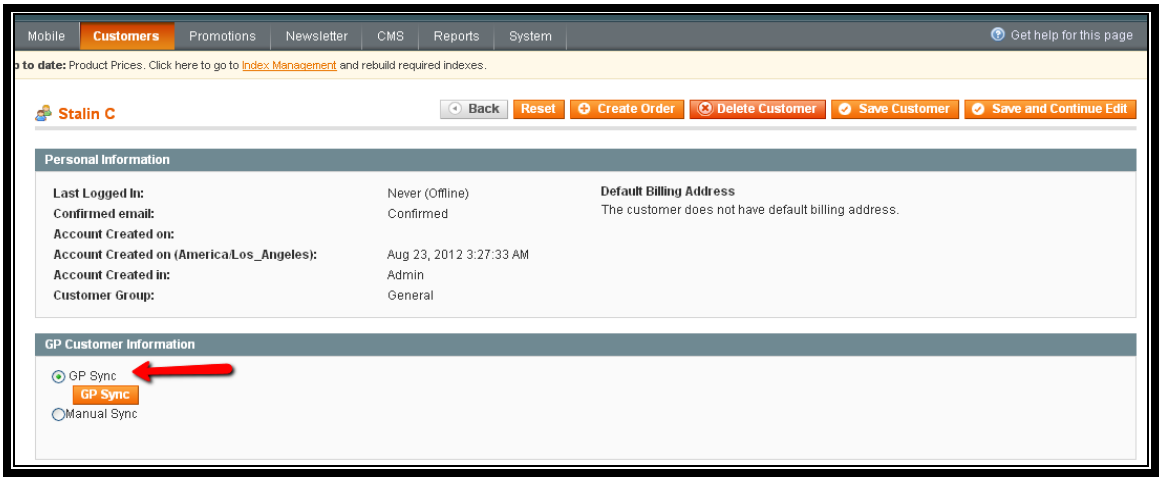

Fig: Offline Customer Sync from Magento to Microsoft Dynamics GP

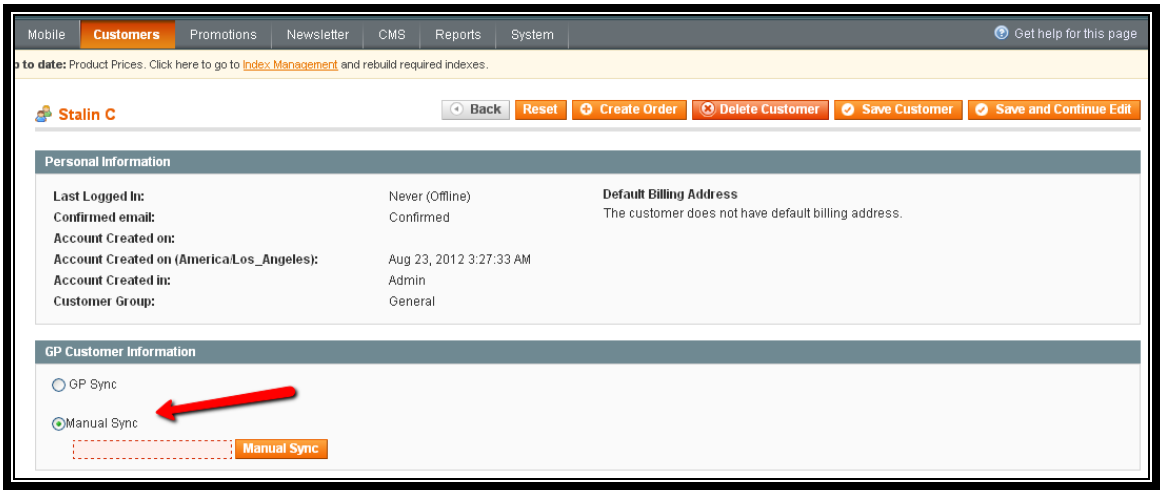

Fig: Manual Offline Customer Sync from Magento to Microsoft Dynamics GP

In order to check back **Offline Customer Creation** in Dynamics GP that's been done from **Magento**, Please follow the navigation

Menu Navigation:

- Open **Dynamics GP**
- Navigate to **Sales → Customer** under **Cards** section
- Click on **Look Up** button for **Customer ID**
- Select **Customer ID** from the look up window
- **Customer Maintenance** window gets popped up with Customer details in Dynamics GP

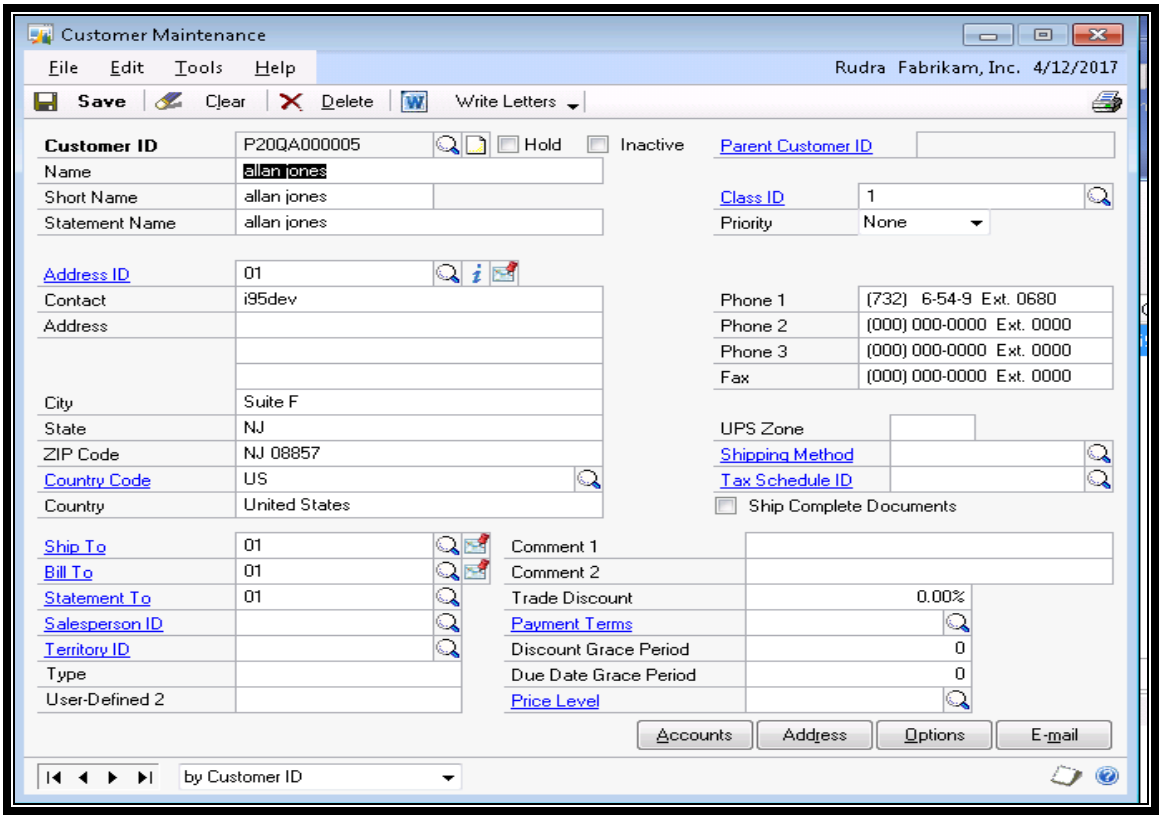

Fig: Offline Customer Creation in Microsoft Dynamics GP

Magento Front End Guest Checkout

Menu Navigation:

- Open **Magento Front End**
- Navigate to the **Product List**
- Select **Required Products**
- Add **Selected Products** to your cart
- Proceed to Check Out
- Once you reach the checkout page, you will see an option to enter details based on different **Checkout Methods**
- Select **Checkout as a Guest** radio button as shown in the below figure

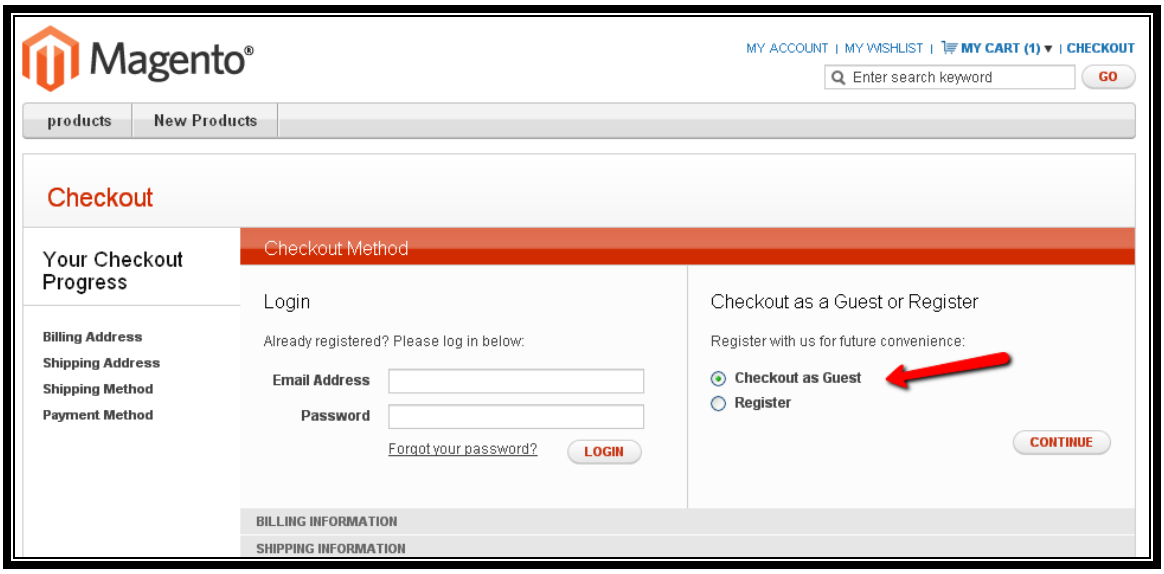

Fig: Checkout as a Guest Customer

- Click **Continue**
- Fill the **Billing, Shipping, Payment, etc.** details
- Click **Place Order**

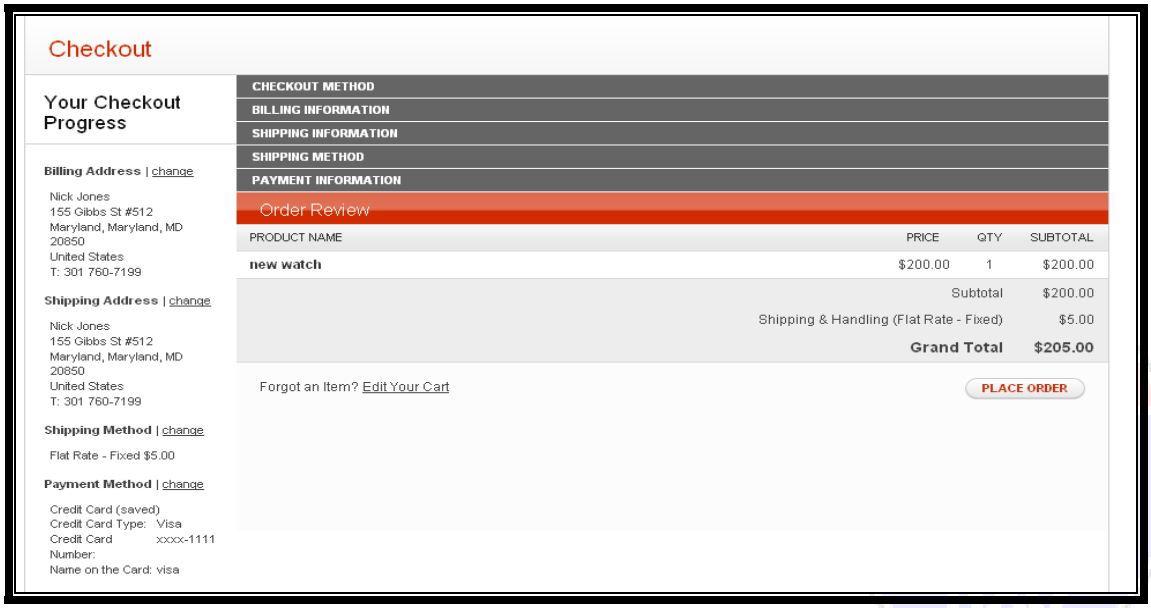

Fig: Guest Customer Placing an Order

- As a **Guest Customer** places an Order, it is created in Dynamics GP with a **GP Order ID** along with the Guest Customer Information
- Once the Order is placed in Dynamics GP, the **GP Order ID** is sent to Magento from Dynamics GP after successful creation of the particular Order
- You can see the **GP Order Creation** at Magento Backend with the **GP Order ID** as shown in the following figure

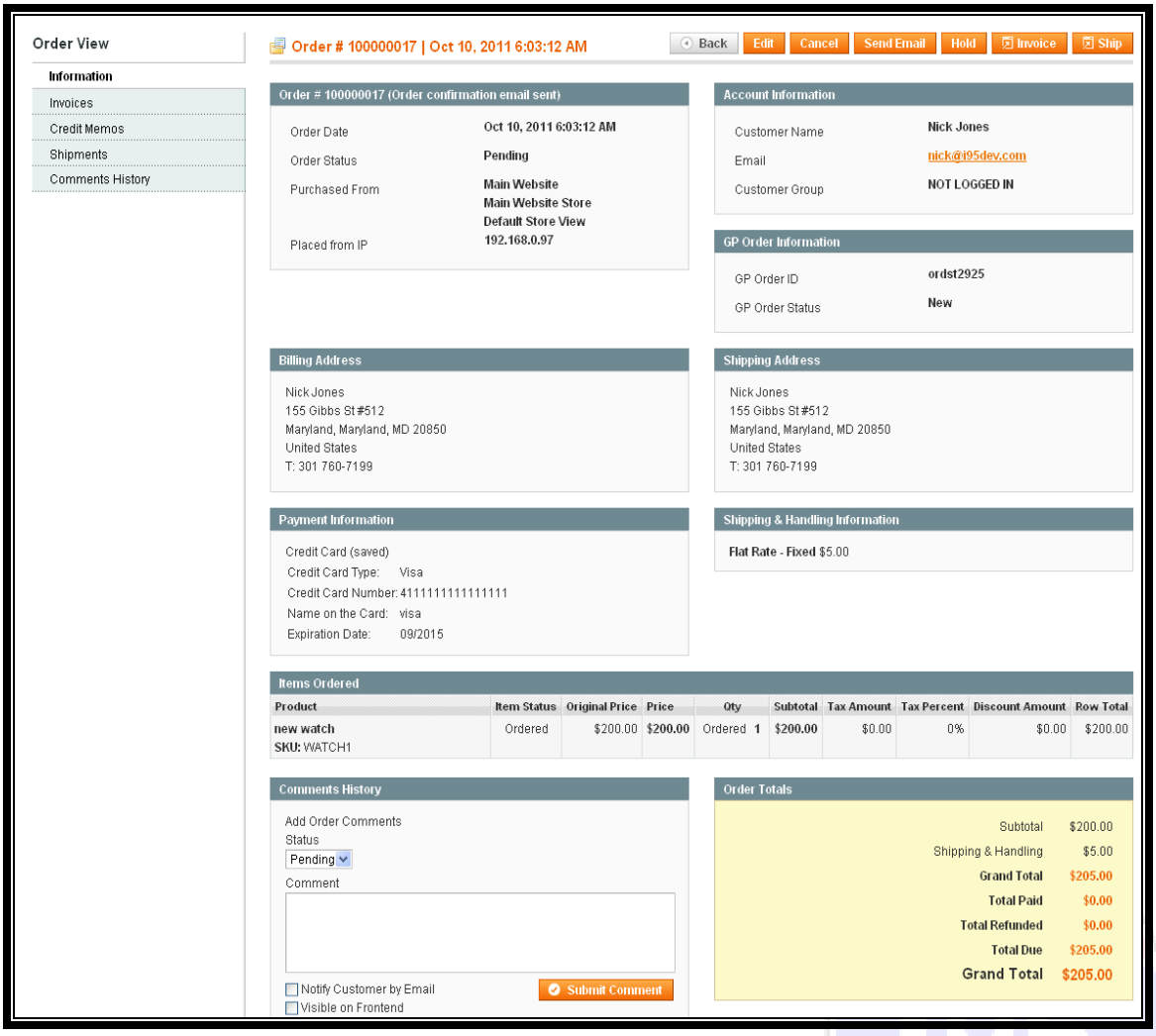

Fig: Guest Customer Placing an Order

In order to check back the **Order Placement by a Guest Customer** in Dynamics GP that's been done from **Magento**, Please follow the navigation

Menu Navigation:

- Open **Dynamics GP**
- Navigate to **Sales Card → Sales Transactions Entry** under **Transactions** section
- Select **Type ID** as **Order**
- Click on **Look Up** button for **Document No**
- Select **Order ID** from look up window
- **Sales Transaction Entry** window gets popped up with Order details in GP as shown in the following figure

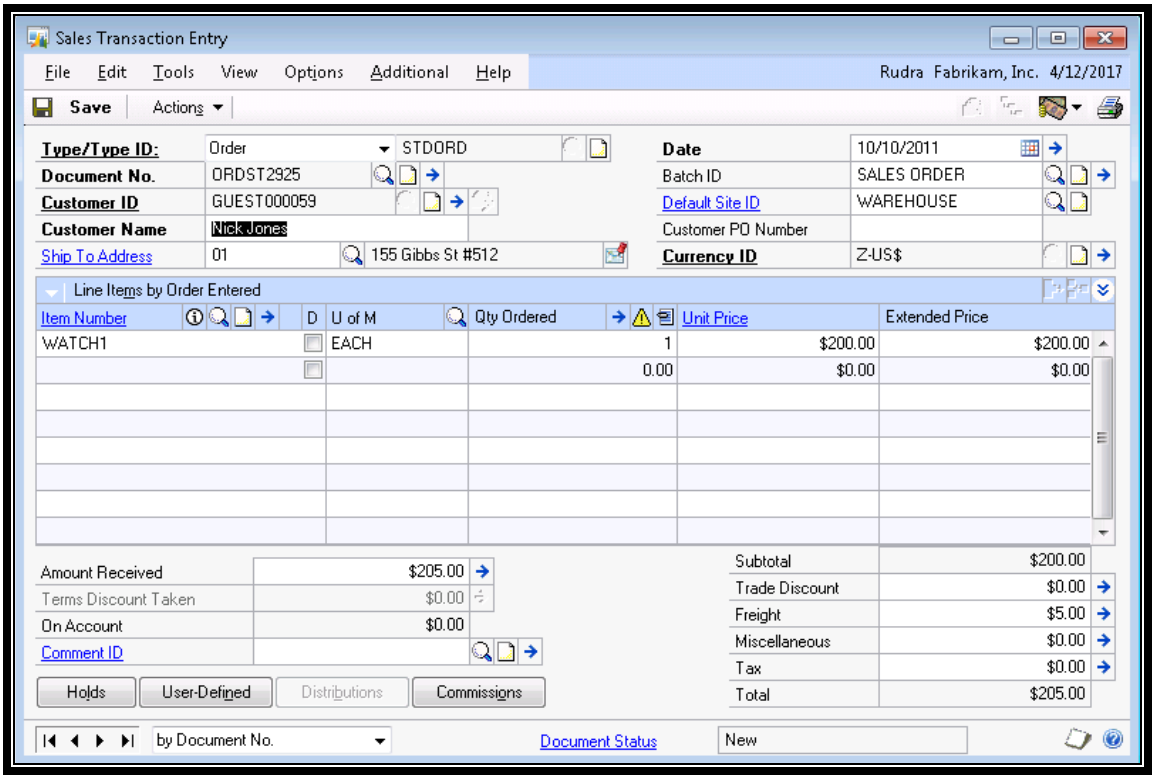

Fig: Order Placement by a Guest Customer

Shipment Creation from Magento to Dynamics GP

Menu Navigation:

- Open **Magento Admin**
- Login to Admin Panel
- Select **Sales → Orders**
- Open the required Order that you would like to create **Shipment** for
- This will show you the **Order View** as shown in the following figure
- In Order to do the Shipment i.e. providing **Tracking Number** in Magento, you have to complete all the Order Statuses of the Fulfillment Process [In Dynamics GP] until '**Ready to Ship**' status
- Once you reach the **Ready to Ship** status at Dynamics GP, you will see the Order View screen with **Ready to Ship** as a **GP Order Status** in Magento as shown in the following figure

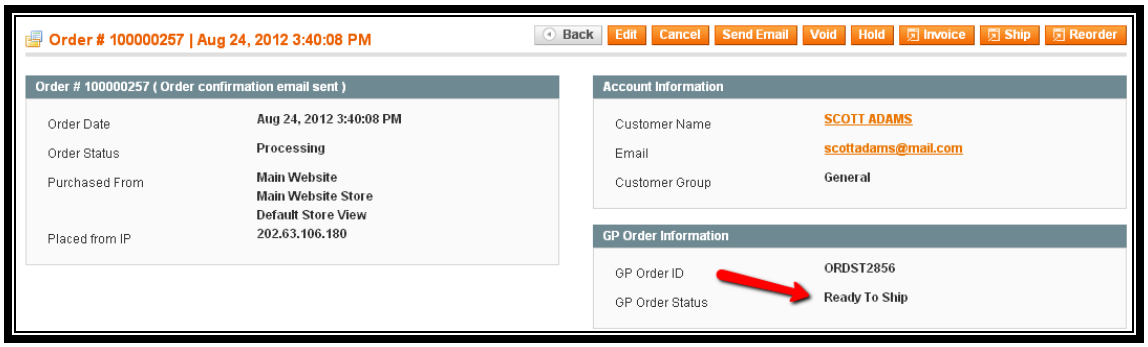

Fig: Order Status Changed to Ready to Ship

- Click on the **Ship** Tab which is on the top most right side
- In the same Order View page, you will have an option called **Add Tracking Number** under Shipping Information column
- Provide the **Shipping Carrier & Tracking Number** as shown in the following figure

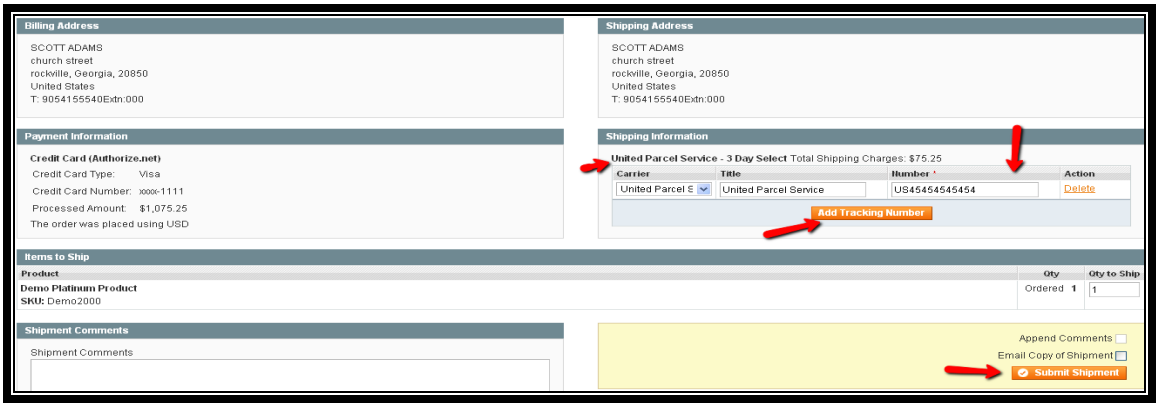

Fig: Entering Tracking Number

- Click **Submit Shipment** button

In order to check the **Shipment Creation** at Dynamics GP that's been done from Magento, Please follow the navigation

Menu Navigation:

- Open **Dynamics GP**
- **Sales Card → Sales Transaction Entry**
- Select the required **Order**
- Click **User Defined** button
- You will see the following screen i.e. **Sales User-Defined Fields Entry** which provides the Tracking number that's been created from Magento

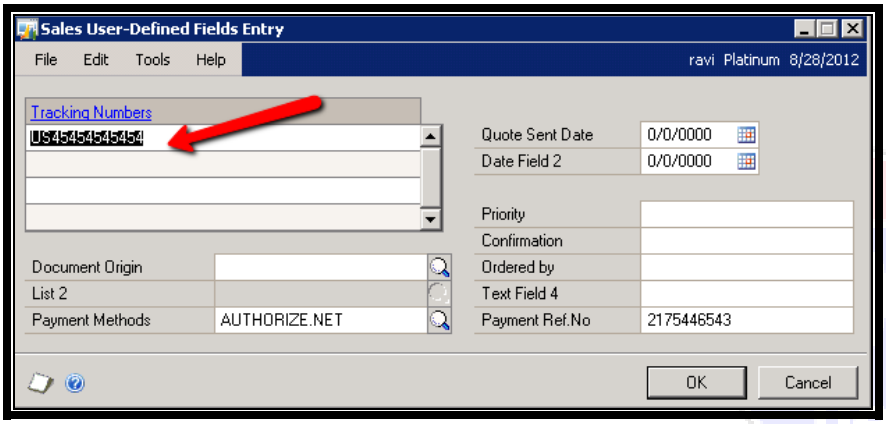

Fig: Tracking Number Viewing in Dynamics GP

Display Order Origin in Magento Order Grid View

Menu Navigation:

- Open **Magento Admin**
- Login to Admin Panel
- Select **Sales → Orders**
- You will see the following screen with the **Order Origin** which lets you know about the Orders that's been placed from Magento as well as Dynamics GP
- If the **Order Origin → GP**, it indicates that the **Order** is placed from Dynamics GP
- If the **Order Origin → Website**, it indicates that the **Order** is placed from Magento

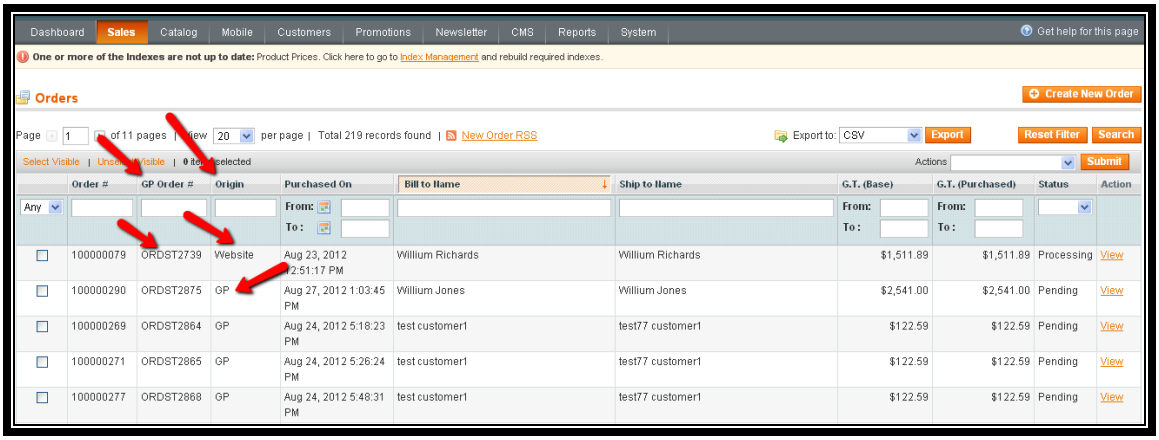
Dashboard
Sales
Catalog
Mobile
Customers
Promotions
Newsletter
CMS
Reports
System
Get help for this page
One or more of the Indexes are not up to date: Product Prices. Click here to go to Index Management and rebuild required indexes.
Orders
Create New Order
Page 1 of 11 pages | View 20 per page | Total 219 records found | New Order RSS
Export to: CSV Export
Reset Filter
Search
Actions
Submit
Order #
GP Order #
Origin
Purchased On
Bill to Name
Ship to Name
G.T. (Base)
G.T. (Purchased)
Status
Action
100000079 ORDST2739 Website Aug 23, 2012 12:51:17 PM Willium Richards Willium Richards $1,511.89 $1,511.89 Processing View
100000290 ORDST2875 GP Aug 27, 2012 1:03:45 PM Willium Jones Willium Jones $2,541.00 $2,541.00 Pending View
100000269 ORDST2864 GP Aug 24, 2012 5:18:23 PM test customer1 test77 customer1 $122.59 $122.59 Pending View
100000271 ORDST2865 GP Aug 24, 2012 5:26:24 PM test customer1 test77 customer1 $122.59 $122.59 Pending View
100000277 ORDST2868 GP Aug 24, 2012 5:48:31 PM test customer1 test77 customer1 $122.59 $122.59 Pending View

Fig: Displaying Order Origin

Display Customer Origin in Magento Customer Grid View

Menu Navigation:

- Open **Magento Admin**
- Login to Admin Panel

- Select **Customers → Manage Customers**
- You will see the following screen with the **Customer Origin** which lets you know about the Customers that's been placed from Magento as well as Dynamics GP
- If the **Customer Origin → GP**, it indicates that the **Customer** is placed from Dynamics GP
- If the **Customer Origin → Website**, it indicates that the **Customer** is placed from Magento

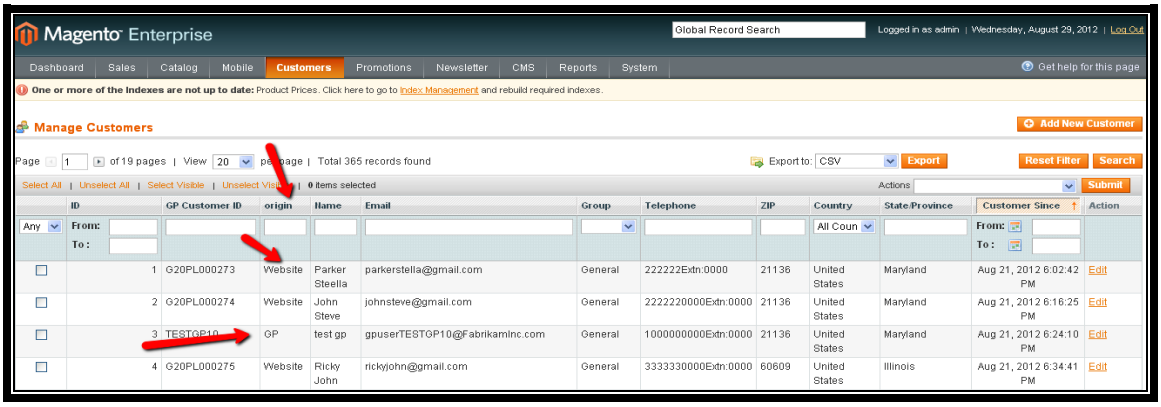
Magento Enterprise
Global Record Search
Logged in as admin | Wednesday, August 29, 2012 | Log Out
Dashboard
Sales
Catalog
Mobile
Customers
Promotions
Newsletter
CMS
Reports
System
Get help for this page
One or more of the Indexes are not up to date: Product Prices. Click here to go to Index Management and rebuild required indexes.
Manage Customers
Add New Customer
Page 1 of 19 pages | View 20 per page | Total 365 records found
Export to: CSV
Export
Reset Filter
Search
Select All | Unselect All | Select Visible | Unselect Visible | 0 items selected
Actions
Submit
ID
GP Customer ID
origin
Name
Email
Group
Telephone
ZIP
Country
State/Province
Customer Since
Action
1 G20PL000273 Website Parker Stella parkerstella@gmail.com General 222222Extn:0000 21136 United States Maryland Aug 21, 2012 6:02:42 PM Edit
2 G20PL000274 Website John Steve johnsteve@gmail.com General 2222220000Extn:0000 21136 United States Maryland Aug 21, 2012 6:16:25 PM Edit
3 TESTGP10 GP test gp gpuserTESTGP10@FabrikamInc.com General 1000000000Extn:0000 21136 United States Maryland Aug 21, 2012 6:24:10 PM Edit
4 G20PL000275 Website Ricky John rickyjohn@gmail.com General 3333330000Extn:0000 60609 United States Illinois Aug 21, 2012 6:34:41 PM Edit

Fig: Displaying Customer Origin

Back Orders

Menu Navigation:

- Open **Magento Admin**
- Login to Admin Panel
- Select an Order & Open it
- Select a Product that has no Inventory
- In the following figure, you can see that **Qty = 6**
- Enable **Back Order** option as shown in the following figure

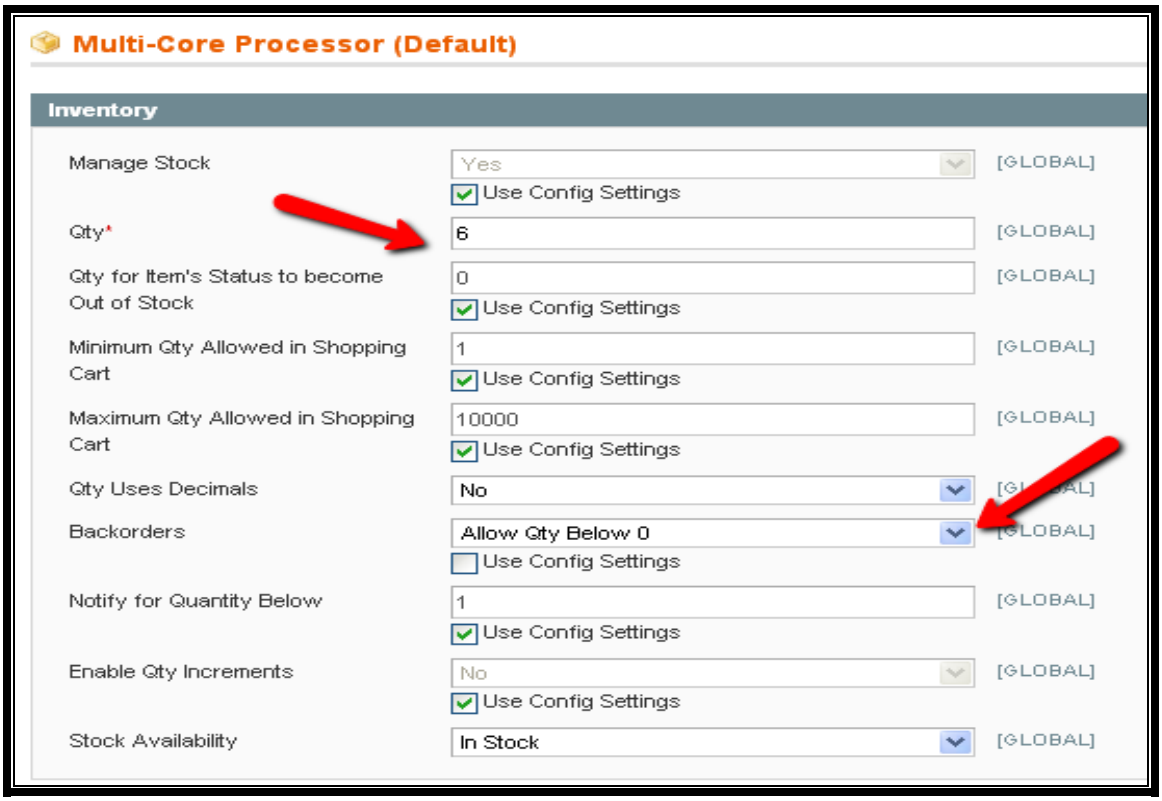

Fig: Enable Back Order Option for a Product

- Now, Go to the Magento Store & Place an Order as shown in the following figure
- In the following figure, the Order was placed for **10 products** where in **4 products** fall under Back Orders as 6 are available earlier

  Note: In the above scenario, the **i95Dev GP Connect** will consider **whole 10 Products as Back Order**

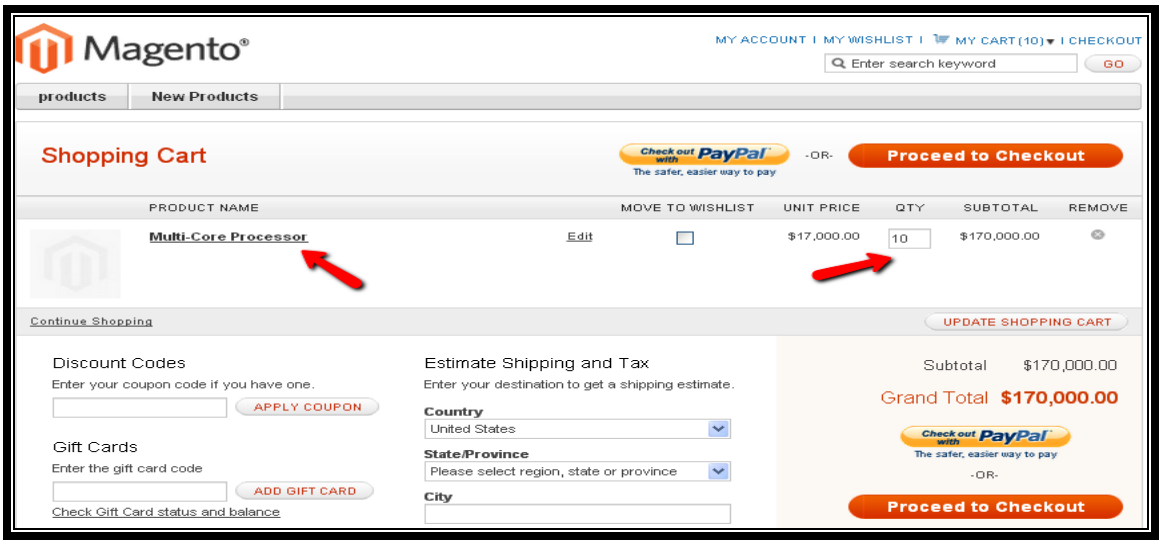

Fig: Placing an Order with a Back Order Products

- Once the Order is placed, you will see the following screen with Order Confirmation

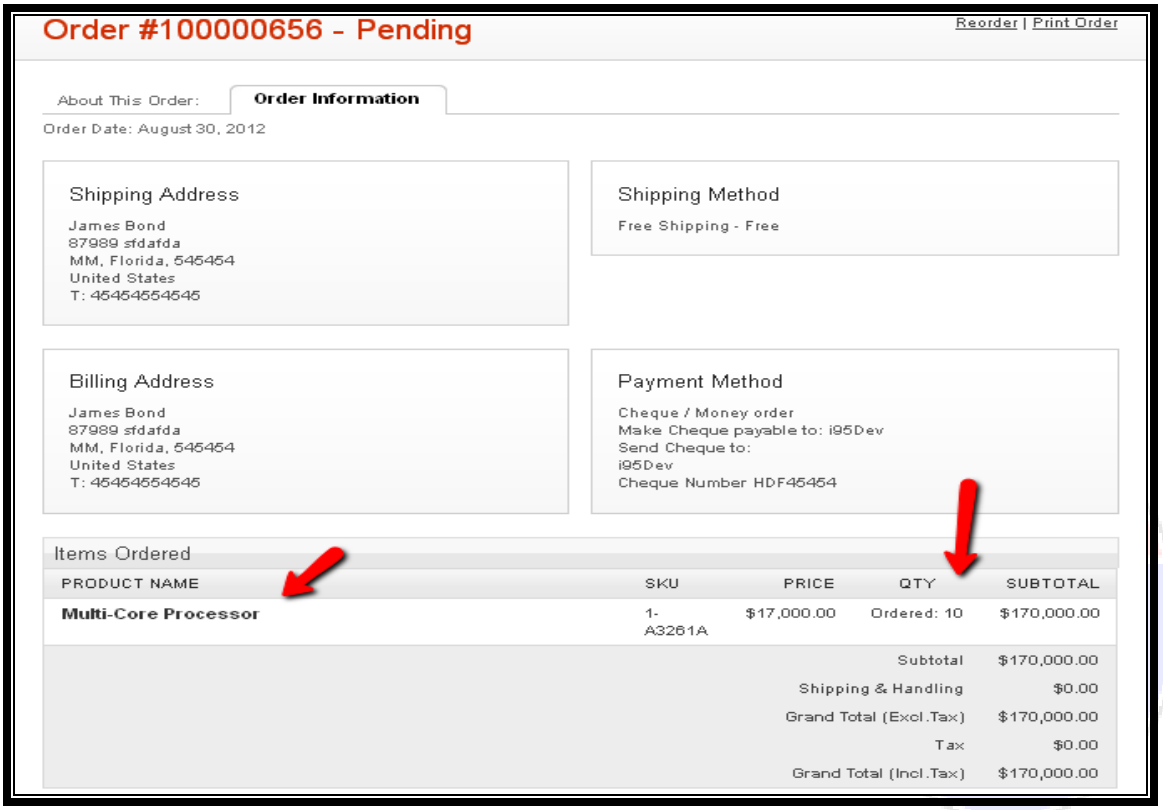

Fig: Order Confirmation for Back Order Products

- In Order to check back the Order Placement at the Magento Back End, follow the navigation
- Open **Magento Admin**
- Login to Admin Panel
- Select **Catalog → Manage Products**
- Open the same Product & You will see the following figure with **Qty = - 4** which are nothing but **Back Orders**

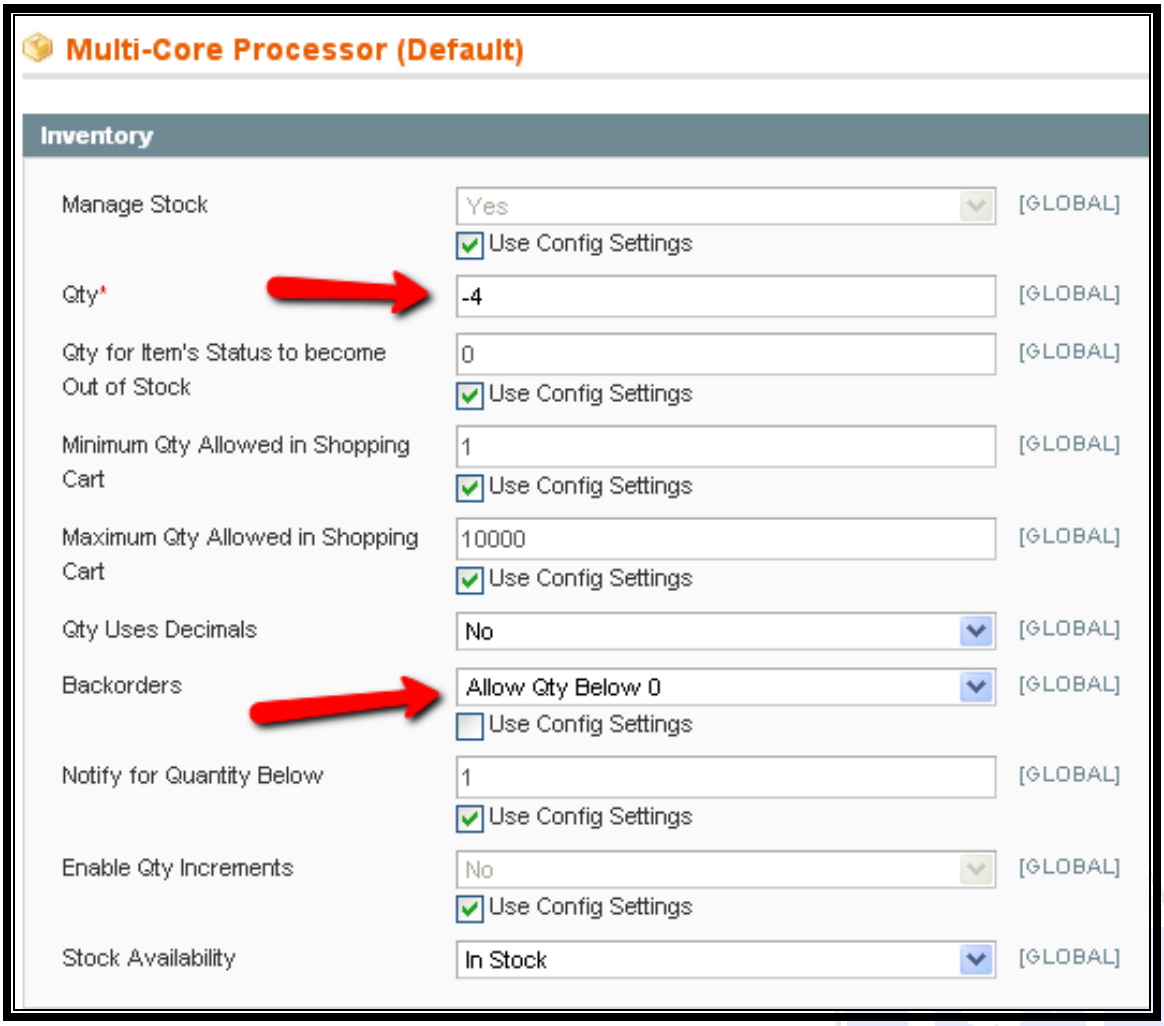

Fig: Inventory Check of an Item at Magento Admin

In order to check the **Back Order** Creation at Dynamics GP that's been done from Magento, Please follow the navigation

Menu Navigation:

- Open **Dynamics GP**
- **Sales Card → Sales Transaction Entry**
- Select the required **Order**
- Click the **Arrow** button for the **Item Number** as shown in the following figure

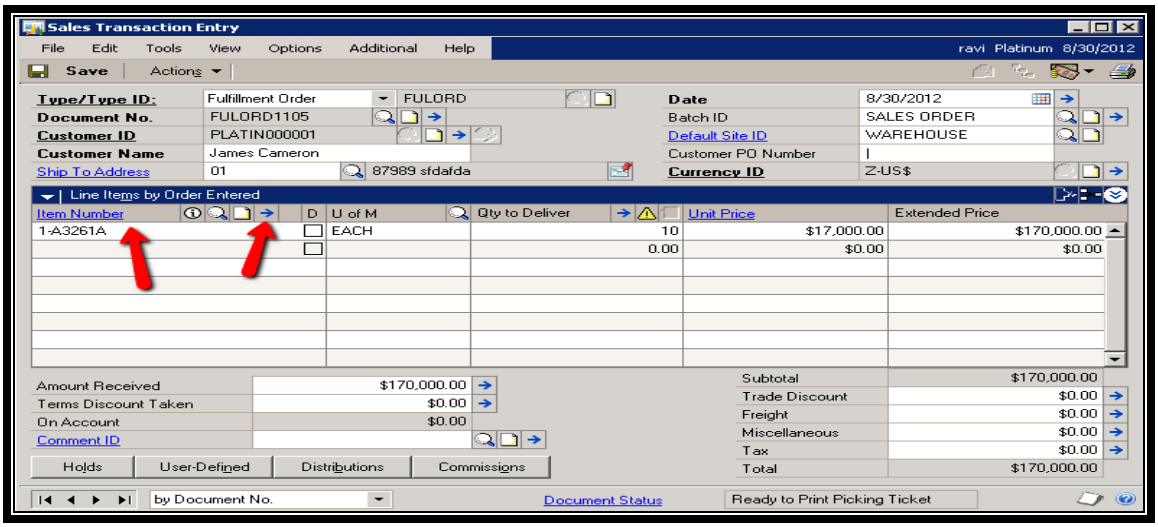

Fig: Sales Transaction Entry with Back Order Product

- Select the required **Order**
- Click the **Arrow** button for the **Item Number** as shown in the above figure
- Once you click the arrow mark you will see the following figure
- You can see the **Number of Back Order Products**

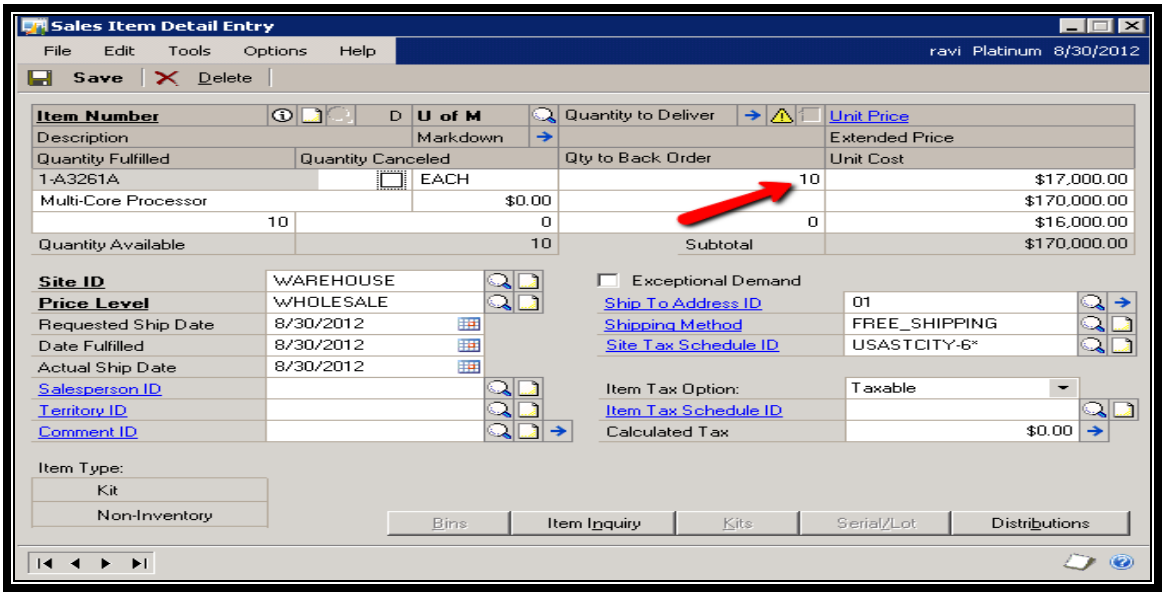

Fig: Order with Back Order Products in Dynamics GP

- You can also check the Inventory of the Products directly unlike above process in order to know whether the Products been ordered under Back Order option
- Select **Inventory → Item** which pops up Item Maintenance window
- Search for the Product & you will see the **Quantity Available = - 4 or (4)** as shown in the following figure which represent the **Back Order Products**

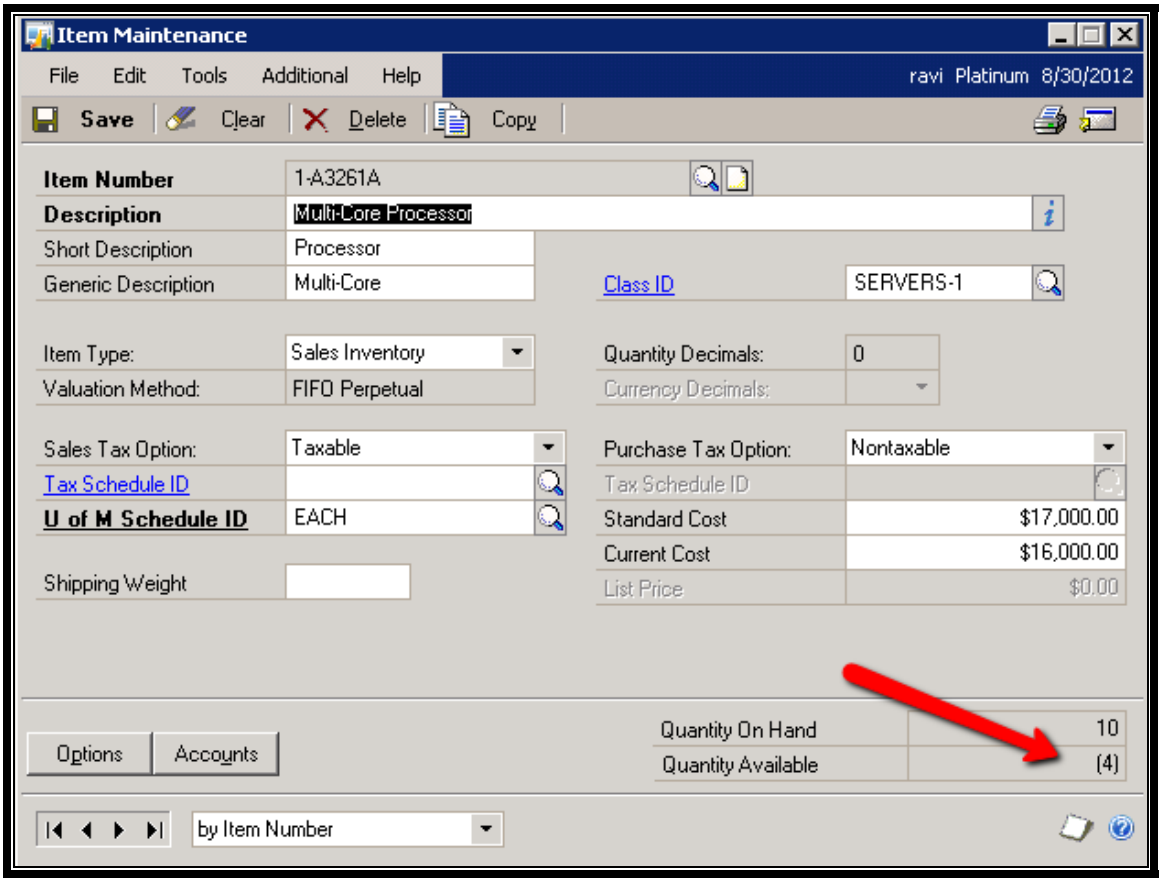

Fig: Inventory Check of the Product in Dynamics GP

Invoice Sync from Magento to GP

Menu Navigation:

- Open **Magento Admin**
- Login to Admin Panel
- Select **Sales → Orders**
- Open a New Order & Open it
- You can see the following figure with an **Order** placed using **Credit Card** information

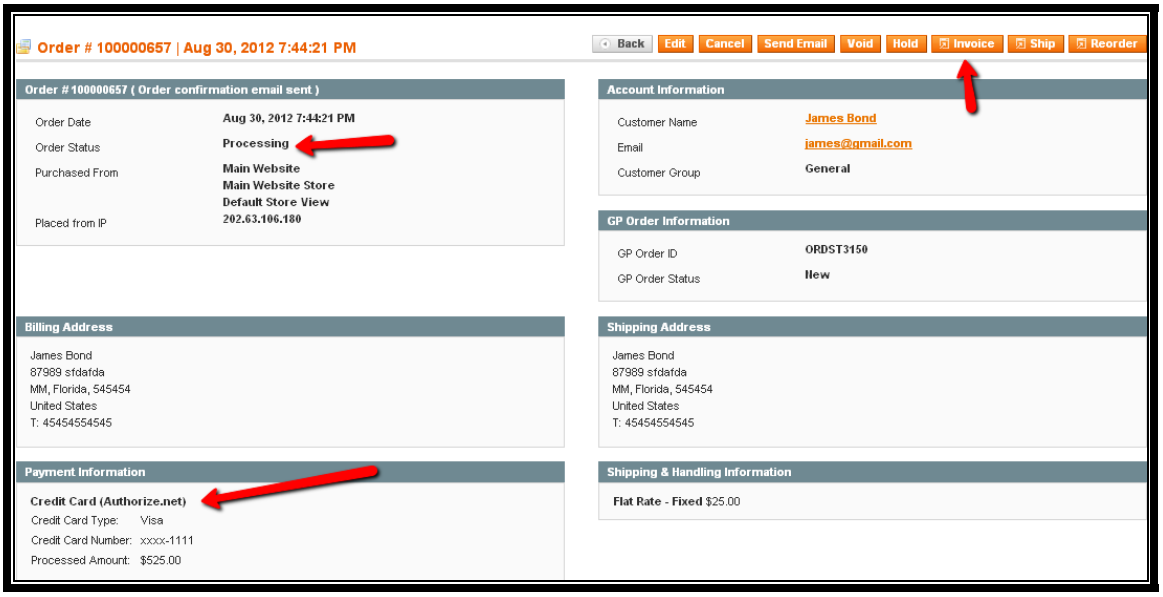

Fig: Order under Processing

- Click **Invoices** which is on the left side under **Order View**
- You will not see any generated invoice

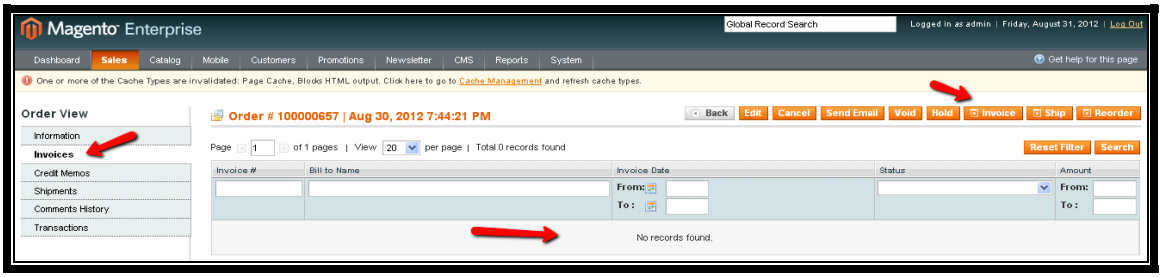

Fig: Displaying of Invoices

- You have to go back to Dynamics GP & Do Fulfillment such as **Pick**, **Pack** until **Ready to Ship**
- Then again, Go to Magento & Open the same Order
- You will see the **Ready to Ship** Order Status
- Click **Ship** as shown in the following figure

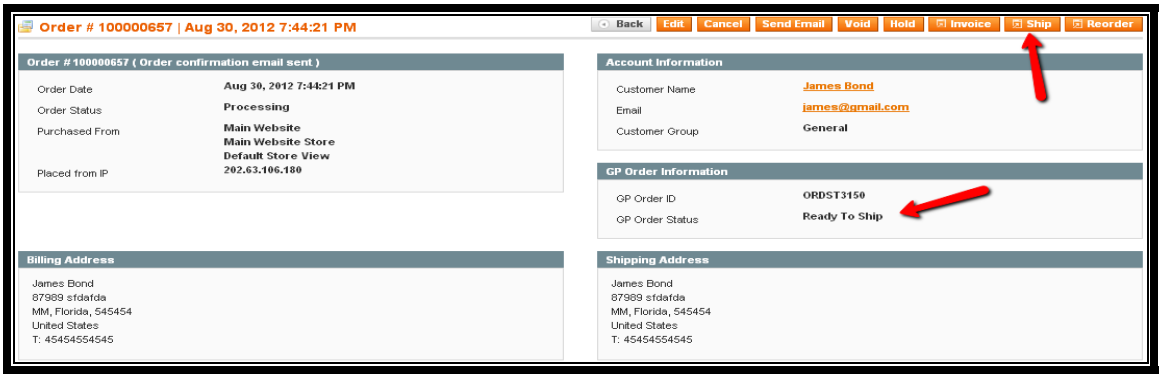

Fig: Shipment Creation from Magento

- Once you click Ship, it creates a shipment for a particular Order
- Click **Shipments** which is on the left side under **Order View**
- You will see the following screen with the **Shipment Creation** for an Order

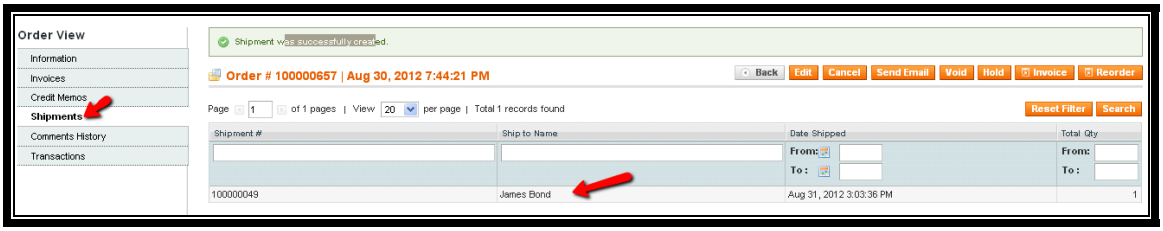

Fig: Shipment Creation from Magento

- Once you Open the shipment created, you will see the following figure with the **Order Status = Shipped**

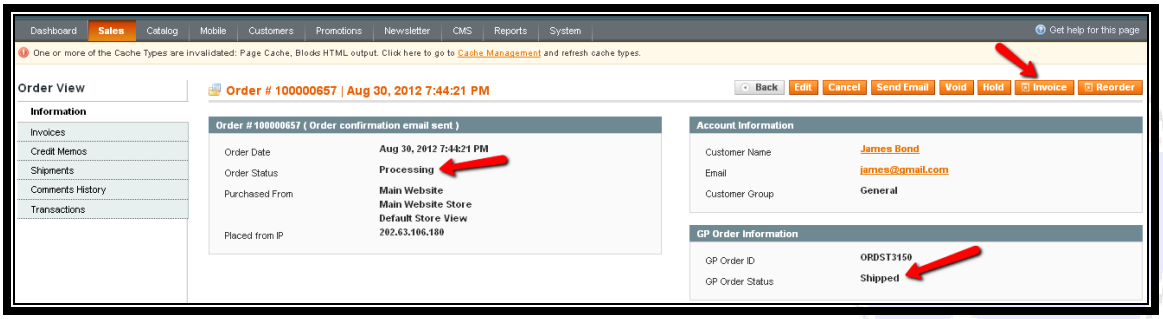

Fig: Shipment Created for an Order

- In order to check back the shipment created from Magento, Go to the Dynamics GP and open the selected Order
- You will see the following figure with the **Order Status = Shipped** in Dynamics GP

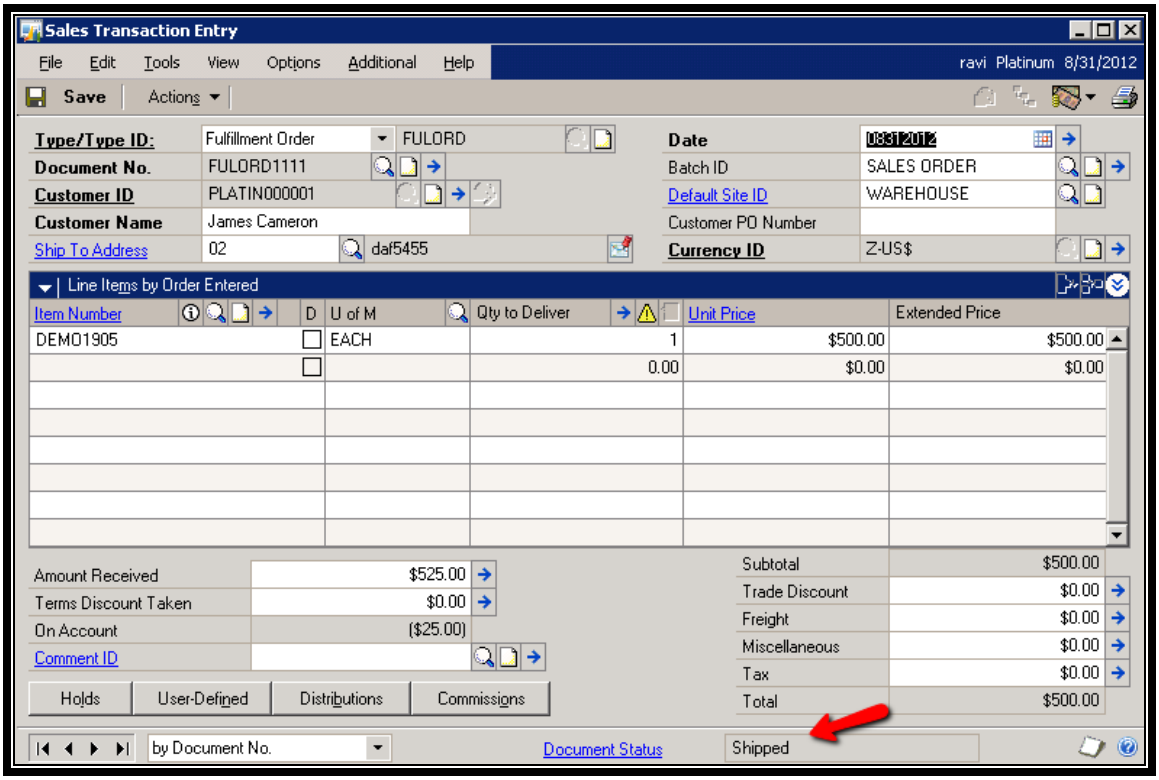

Fig: Order Status Shipped at GP

- Now go back to Magento & Open the same Order
- Click **Invoice** tab which shows the following screen

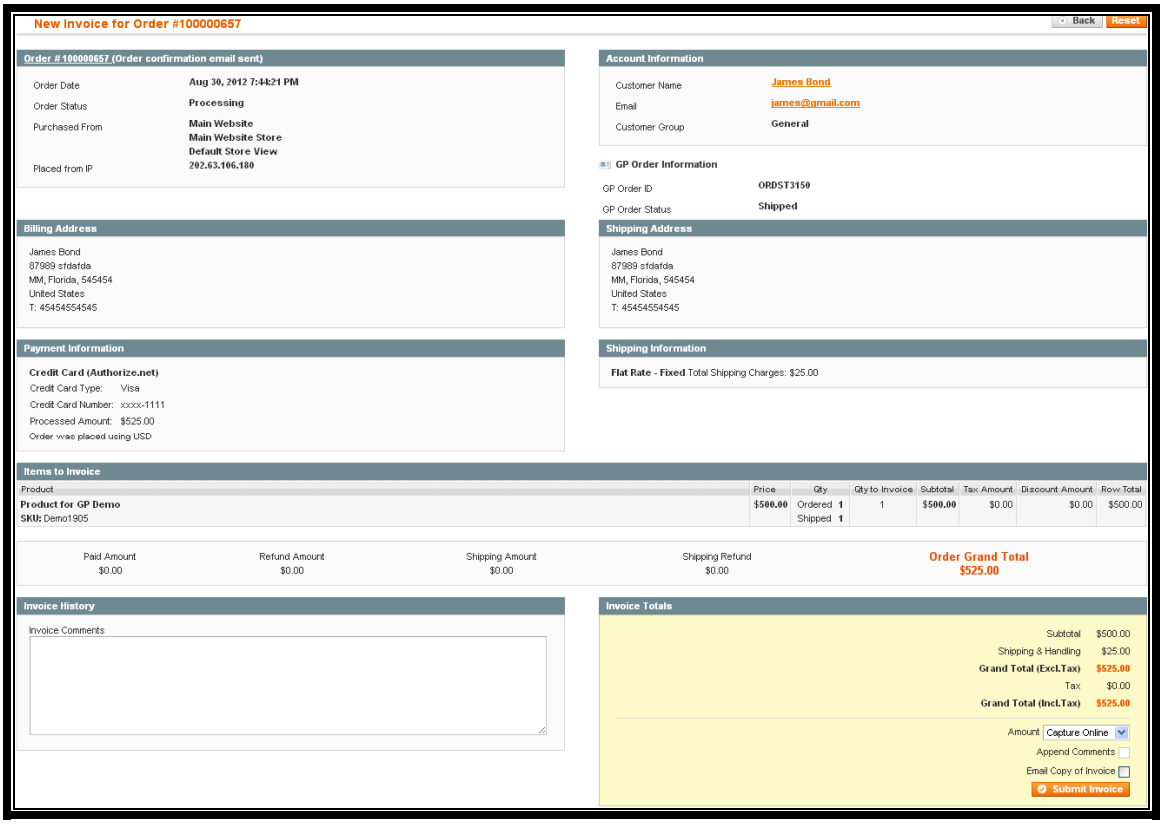

Fig: Invoice Creation for an Order

- Click **Submit Invoice** as shown in the above figure
- Once you click submit, it will take you to the **Order View** Page
- Click on **Invoice** tab
- You will see the following figure with the generated invoice of a particular Order

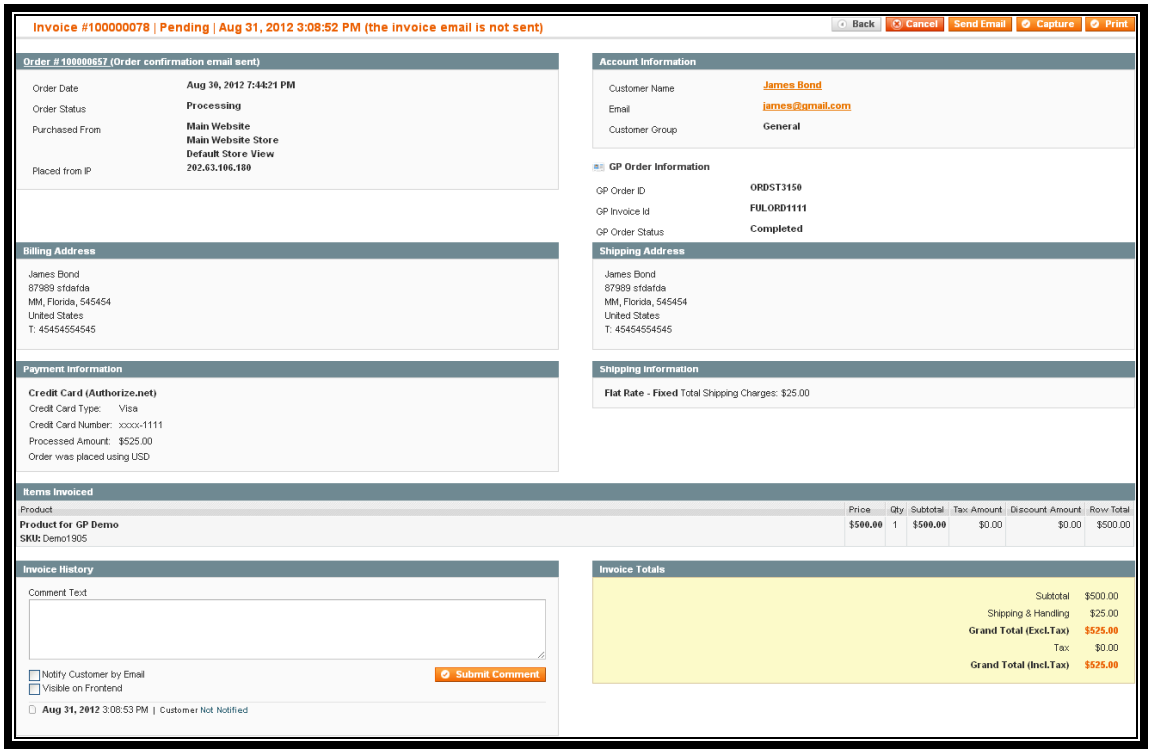

Fig: Generated Invoice for an Order

- Click on **Invoice** tab
- You will see the following figure with the generated invoice of a particular Order

In order to check the **Invoice Creation** at Dynamics GP that's been done from Magento, Please follow the navigation

Menu Navigation:

- Open **Dynamics GP**
- **Sales Card → Sales Transaction Entry**
- Select the required **Order**
- You will see the following figure with the Invoice generation

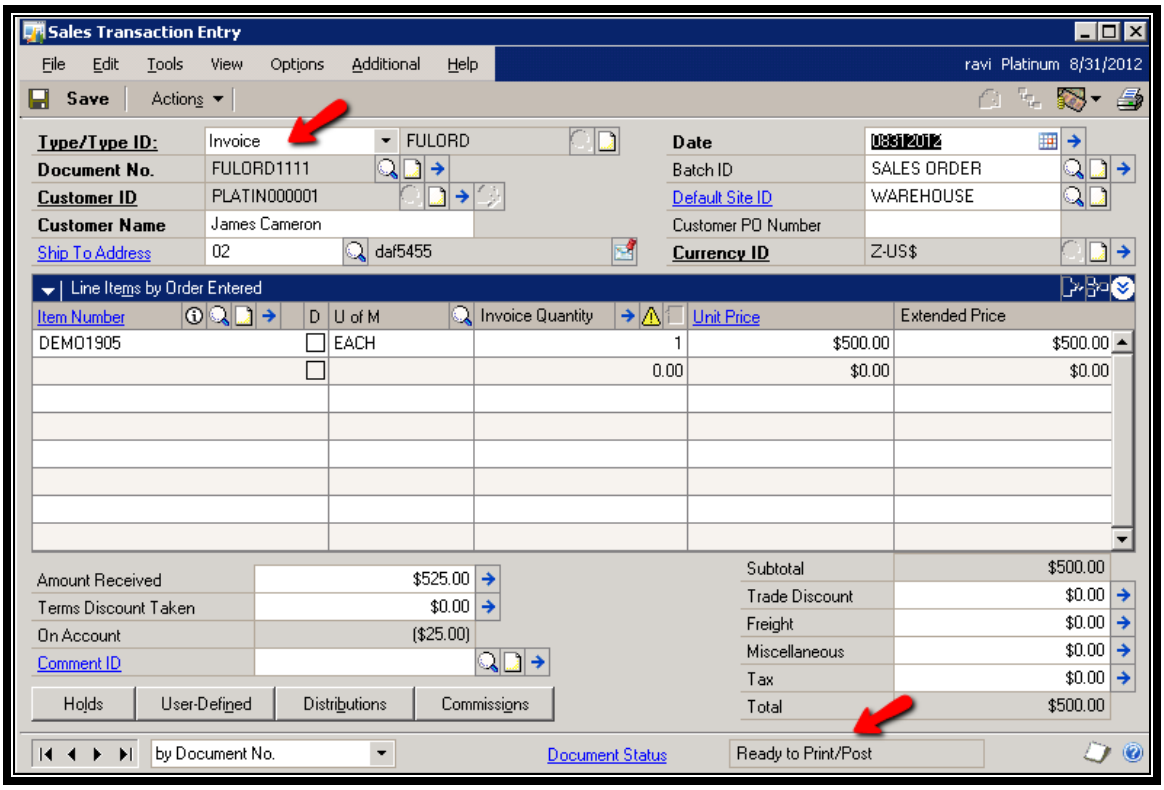

Fig: Invoice Created at Dynamics GP

Customer Creation from GP

Customer Creation from GP without 'WEBSTADD'

Menu Navigation:

- Open **Dynamics GP**
- Select **Sales → Customer**
- Enter the Customer information as shown in the following figure
- Enter **Customer ID** manually where in **Customer ID** should be **Alpha Numeric or Alphabets or Numerical**.
- **Special Characters** are **Not Accepted**
- Provide **Class ID & Customer Name** as per your requirement

- Provide all the mandatory fields such as **Contact, Address [01,02, etc], City, State (Short form), Zip Code, Country Code, Phone 1**
- Set the **Price Level** to **Default**
- Click **Save**

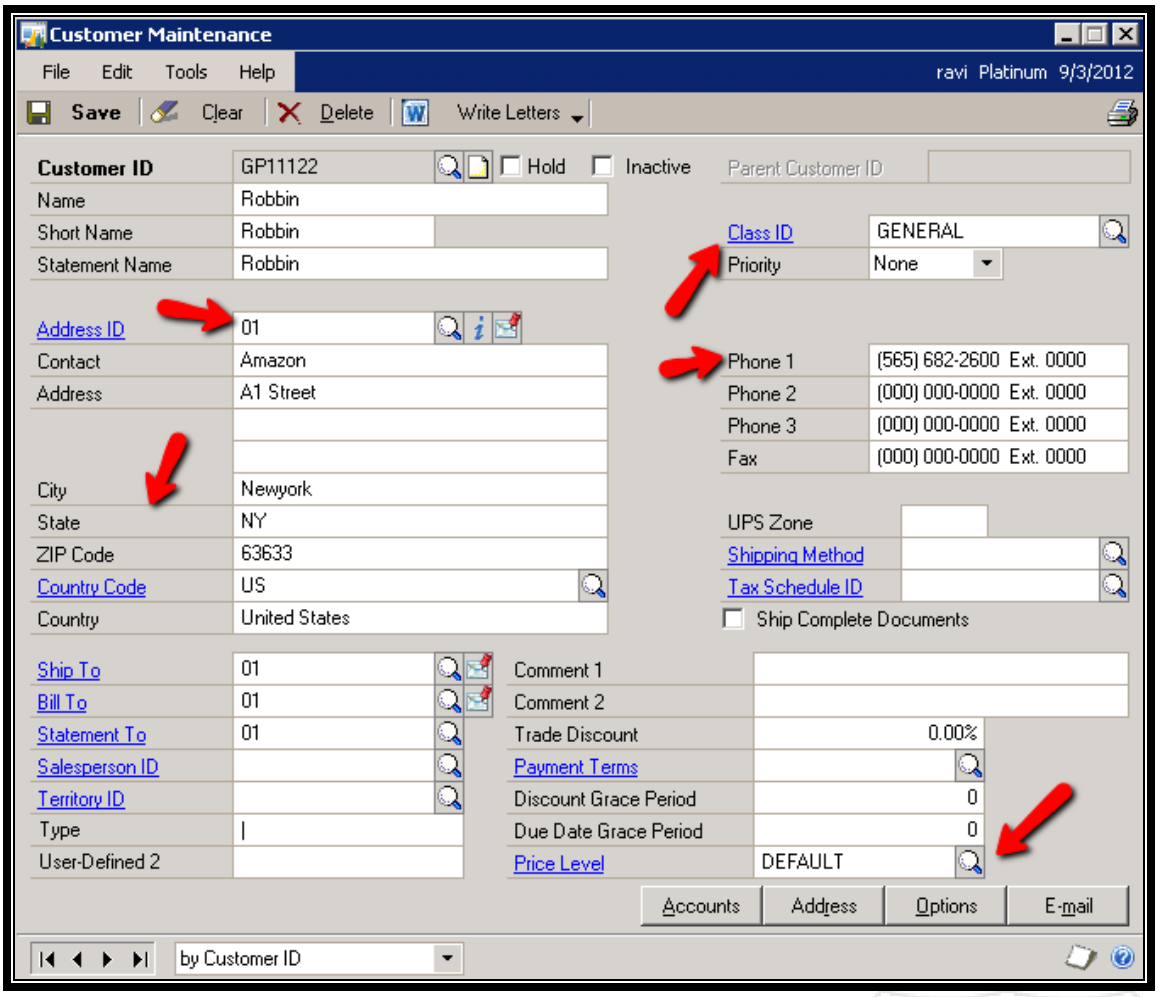

Fig: Customer Creation in Dynamics GP

In order to check back the **Customer Creation** in Magento that's been done from **Dynamics GP**, Please follow the navigation mentioned

Menu Navigation

- Open **Magento Admin**
- Login to Admin Panel
- Navigate to **Customers → Manage Customer**

- Select the **Customer** that's been created in Dynamics GP
- You will see the **Customer Information** in Magento as shown in the following figure
- You will see an email address that's been generated from Dynamics GP. This email address is generated as gpusergpcustomerid@companyname.com
- In the above email address mentioned, the **GP User** is the **Constant String**, whereas **GP Customer ID** is the Customer ID given at the time of Customer Creation in Dynamics GP

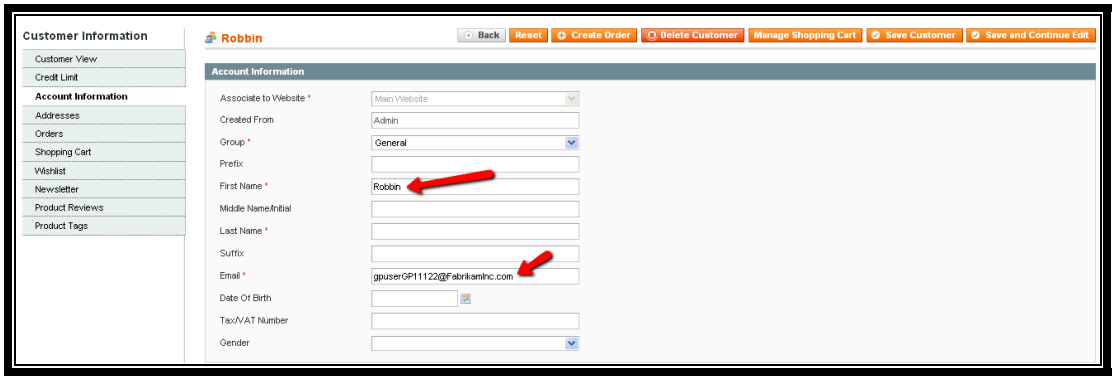

Fig: Customer Creation from Dynamics GP to Magento

Customer Creation from GP with 'WEBSTADD'

Menu Navigation:

- Open **Dynamics GP**
- Select **Sales → Customer**
- Enter the Customer information as shown in the following figure
- Enter **Customer ID** manually where in **Customer ID** should be **Alpha Numeric or Alphabets or Numerical**.
- **Special Characters** are **Not Accepted**
- Provide **Class ID & Customer Name** as per your requirement
- It' a mandatory that you provide the Address Details such as **City, Zip Code, Country, State (Short Forms), Phone 1, etc**. in Dynamics GP in order to Create a Customer Address Successfully in Magento
- Click '**i**' which is next to the **Address ID** search icon which pops up **Internet Information** window as shown in the following figure

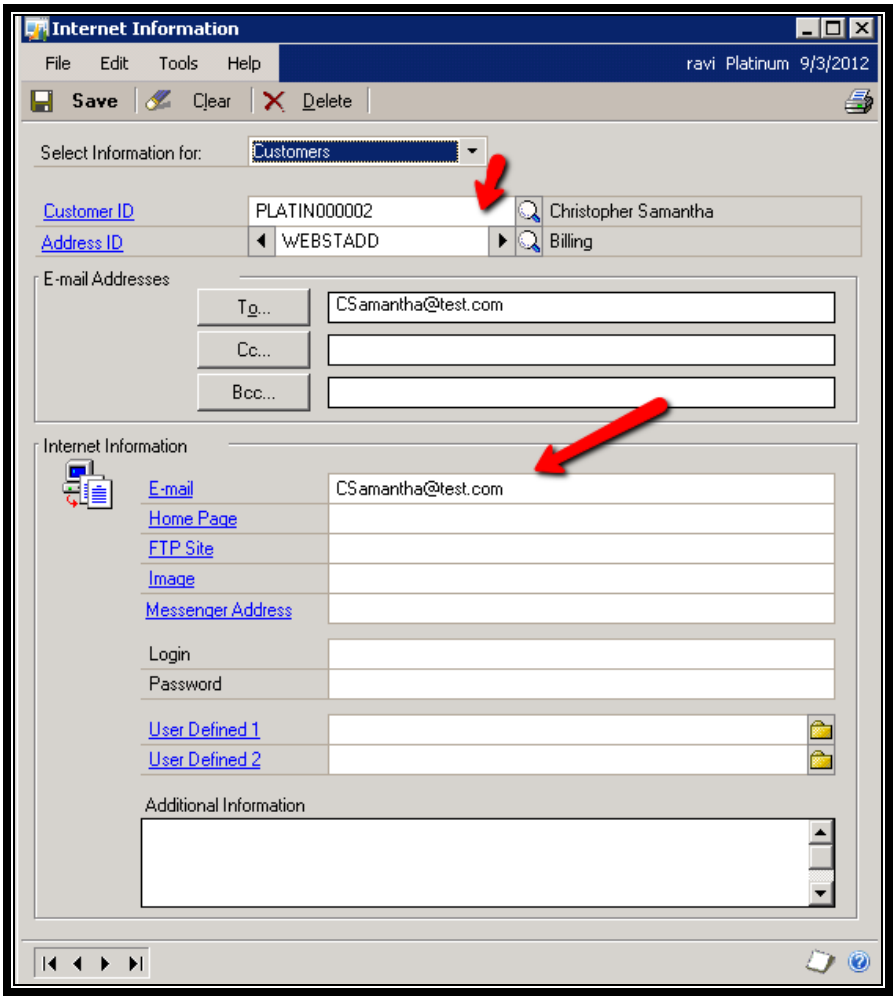

Fig: Customer Email Address Creation from GP to Magento

- Provide your **email address** in the **Internet Information Screen**
- Click **Save** & Close the window
- Go back to the **Customer Maintenance Window**
- Set the **Price Level** to **Default** as shown in the following figure
- Click **Save**

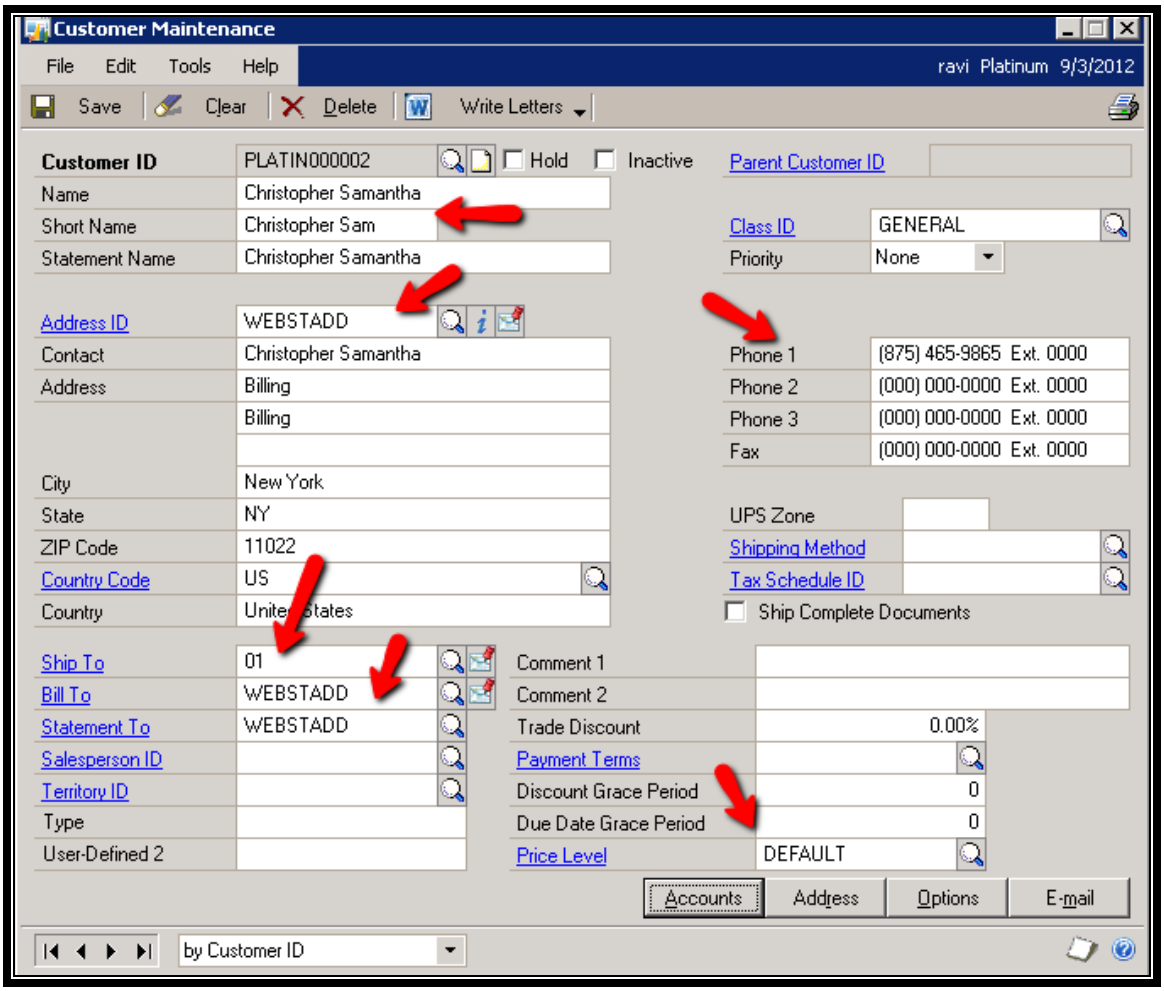

Fig: Customer Creation in Dynamics GP

In order to check back the **Customer Creation** in Magento that's been done from **Dynamics GP**, Please follow the navigation mentioned

Menu Navigation

- Open **Magento Admin**
- Login to Admin Panel
- Navigate to **Customers → Manage Customer**
- Select the **Customer** that's been created in Dynamics GP
- You will see the **Customer Information** in Magento as shown in the following figure

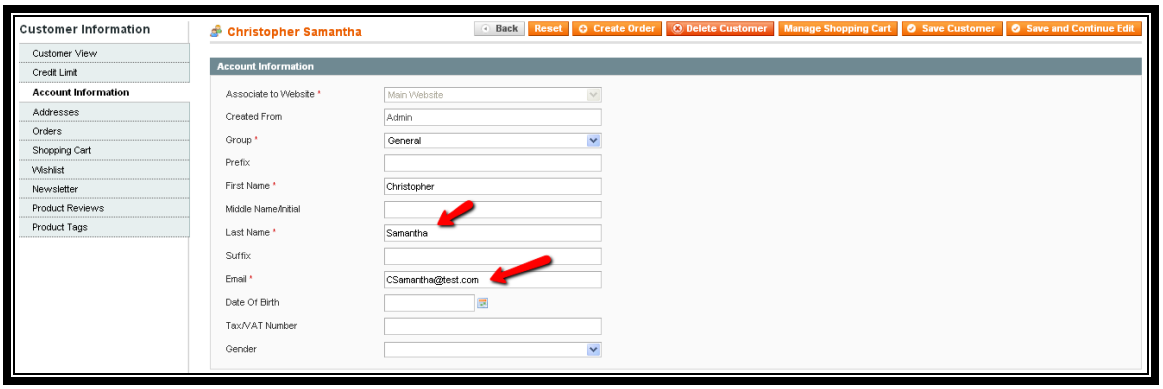

Fig: Customer Creation from Dynamics GP to Magento

Customer Update from GP

Customer Update from GP without 'WEBSTADD'

Menu Navigation:

- Open **Dynamics GP**
- Select **Sales → Customer → Customer ID**
- Update the personal information like **First Name, Last Name** as shown in the following figure
  Note: Only **First Name** & **Last Name** can be updated but nothing else
- You can update each and every field of **Customer Maintenance** window for any **Customer ID**
- Click **Save**

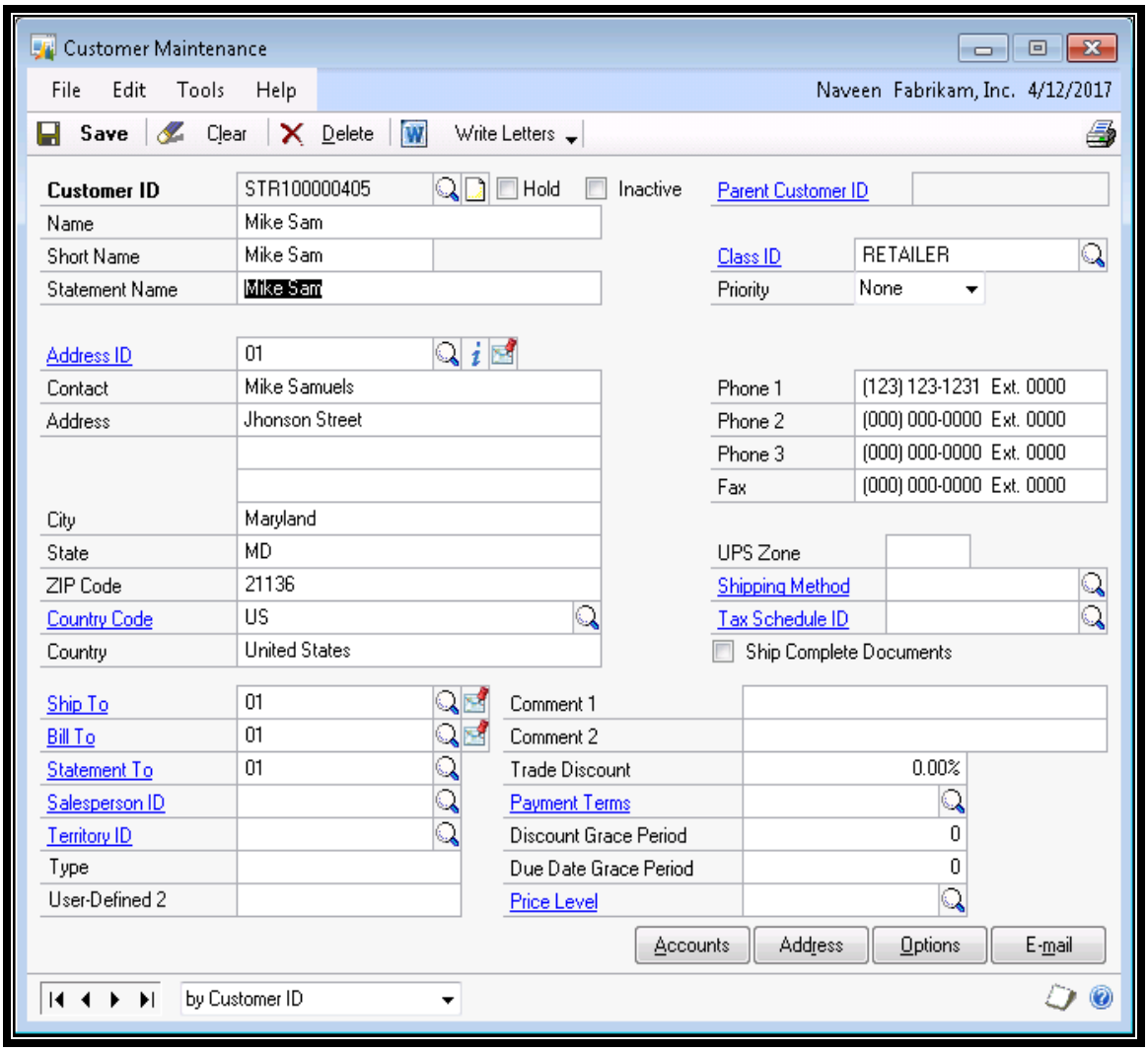

Fig: Updating Customer Information in Dynamics GP

In order to check back the **Customer Information Updating** in Magento that's been done from **Dynamics GP**, Please follow the navigation mentioned

Menu Navigation

- Open **Magento Admin**
- Select **Customers → Manage Customer**
- Select the customer that has been updated in Dynamics GP which shows the updated information of the Customer as shown in the following figure

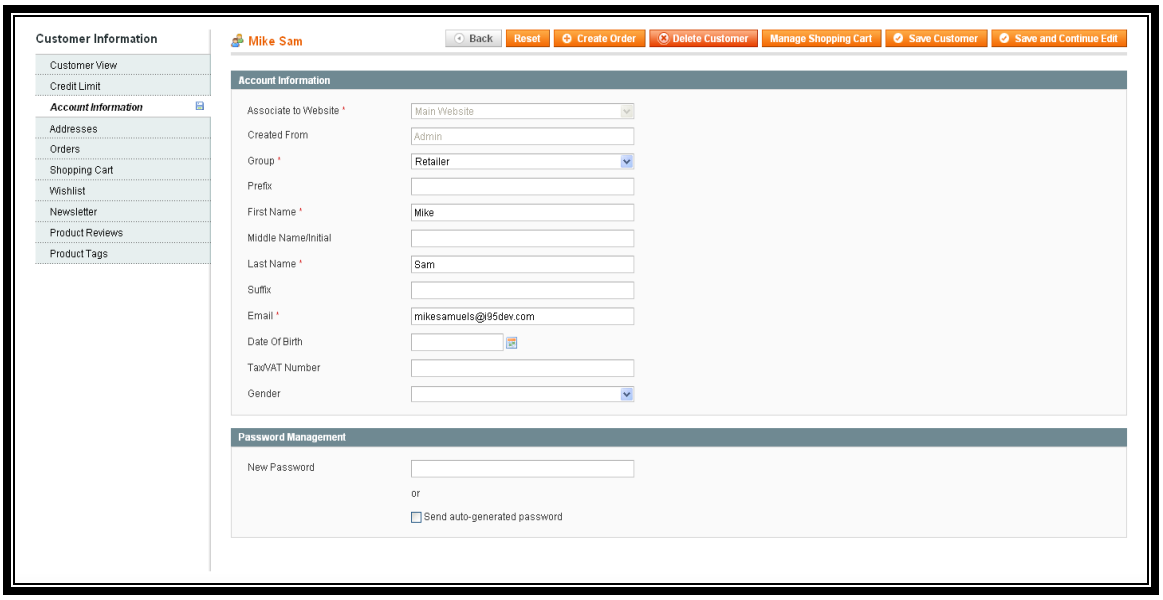

Fig: Updated Customer Information from Dynamics GP to Magento

Customer Update from GP with 'WEBSTADD'

Menu Navigation:

- Open **Dynamics GP**
- Select **Sales → Customer → Customer ID**
- Select **Customer ID** whose **Address ID** is a **WEBSTAAD**
- Update the personal information like **First Name, Last Name & eMail Address** as shown in the following figure
- **Note:** Only **First Name**, **Last Name** & **eMail Address** can be updated but nothing else

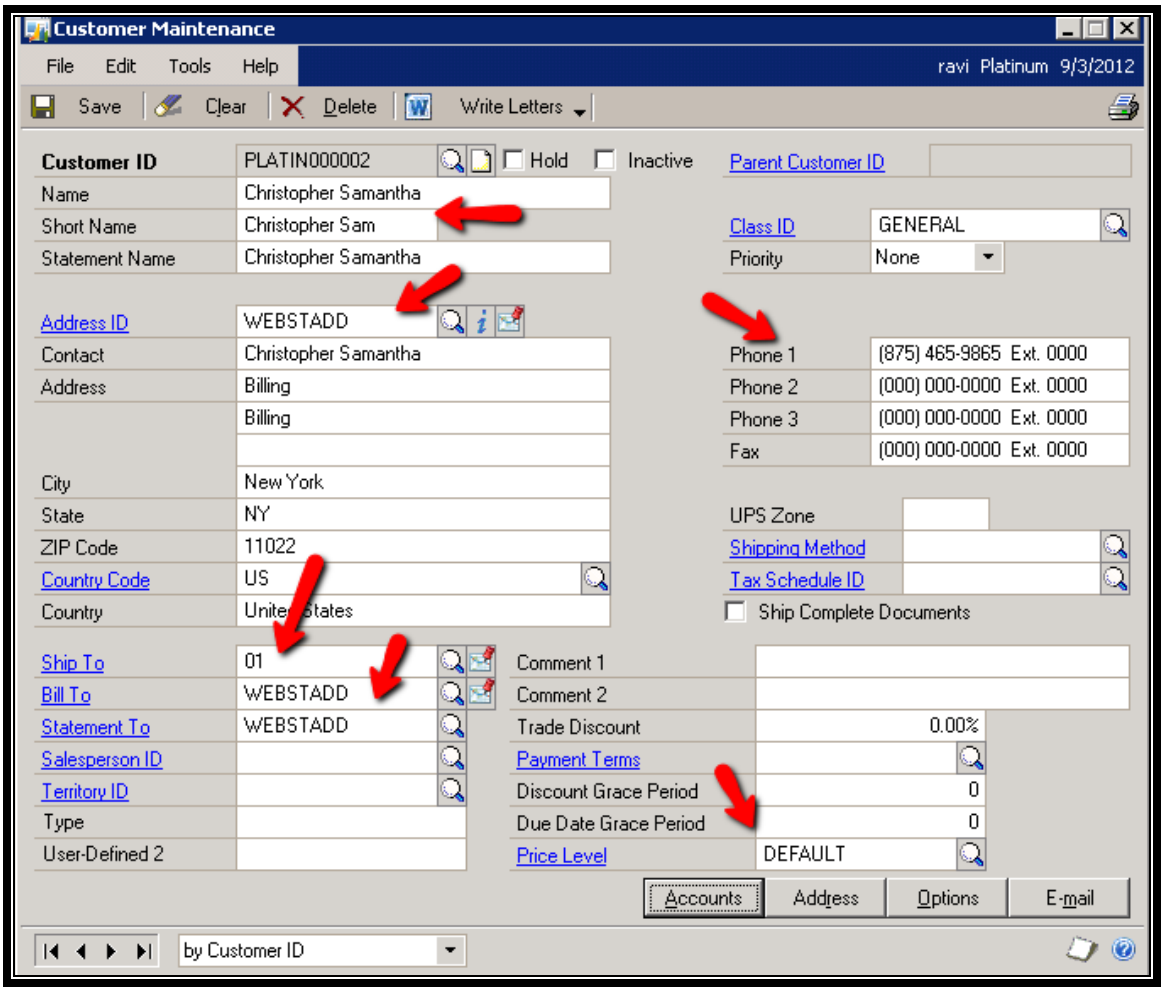

Fig: Updating Customer Information in Dynamics GP

- You can update each and every field of **Customer Maintenance** window for any **Customer ID**
- You can even update the email address by Clicking '**i**' symbol which is next to Address Search icon as shown in the above section i.e. **Customer Creation from GP with WEBSTAAD**
- Click **Save**

In order to check back the **Customer Information Updating** in Magento that's been done from **Dynamics GP**, Please follow the navigation mentioned

Menu Navigation

- Open **Magento Admin**
- Select **Customers → Manage Customer**

- Select the customer that has been updated in Dynamics GP which shows the updated information of the Customer as shown in the following figure

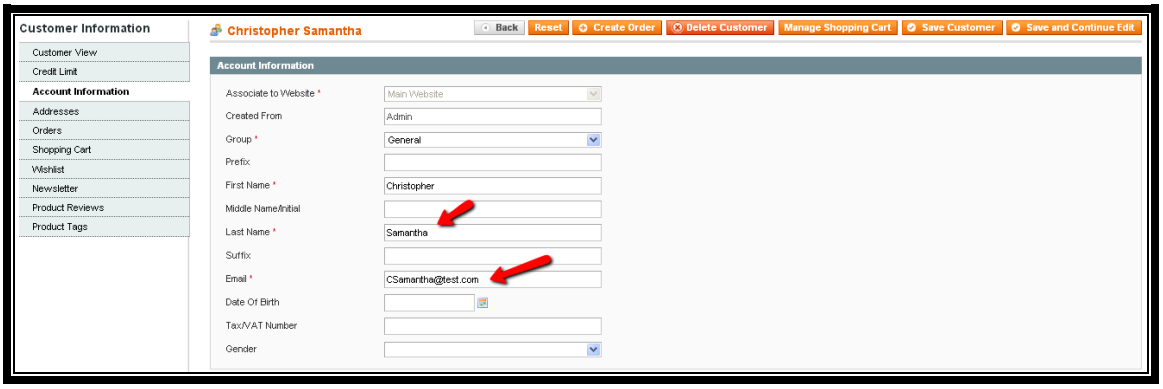

Fig: Updated Customer Information from Dynamics GP to Magento

Customer Address Creation from GP

Customer Address Creation with 'WEBSTADD' from GP

Menu Navigation:

- Open **Dynamics GP**
- Select **Sales → Customer**
- Click **Customer** which pops up a **Customer Maintenance** window
- Select the required Customer
- Enter "**WEBSTADD**" in **Address ID** & Provide the Address Details such as **City, Zip Code, Country, State (Short Forms), Phone 1, etc**
- You can even create the email address by Clicking '**i**' symbol which is next to Address Search icon as shown in the above section i.e. **Customer Creation from GP with WEBSTAAD**
- In this scenario i.e. **Customer Address Creation** with **WEBSTADD,** the **WEBSTAAD Address** is treated as **Billing Address** as **Shipping Address** as shown in the following figure

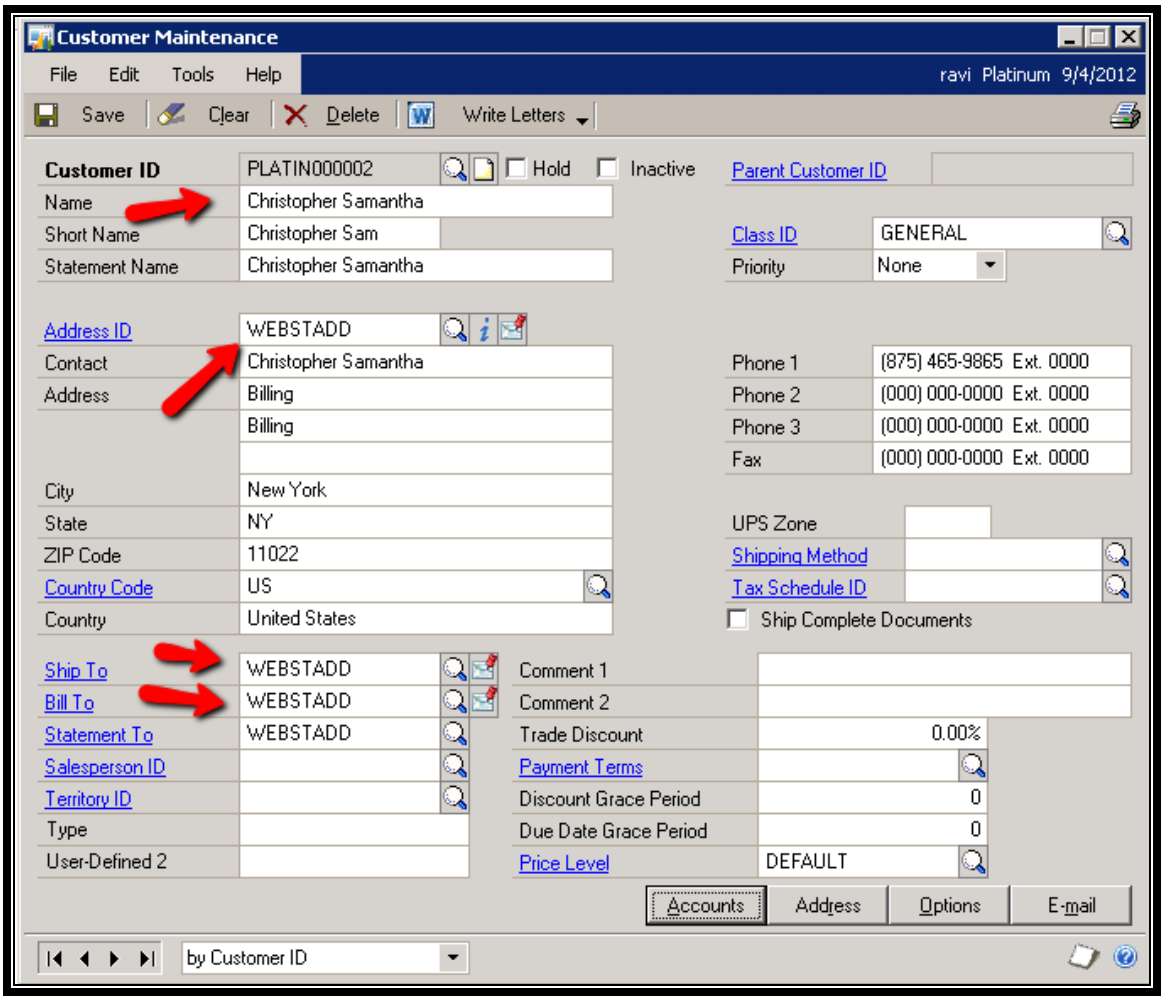

Fig: Customer Address Creation with WEBSTAAD from Dynamics GP

- Incase if you would like to provide a different address for **Shipping**, then Enter "**01**" in **Address ID**
- It' a mandatory that you provide the Address Details such as **City, Zip Code, Country, State (Short Forms), Phone 1, etc**. in Dynamics GP in order to Create a Customer Address Successfully in Magento

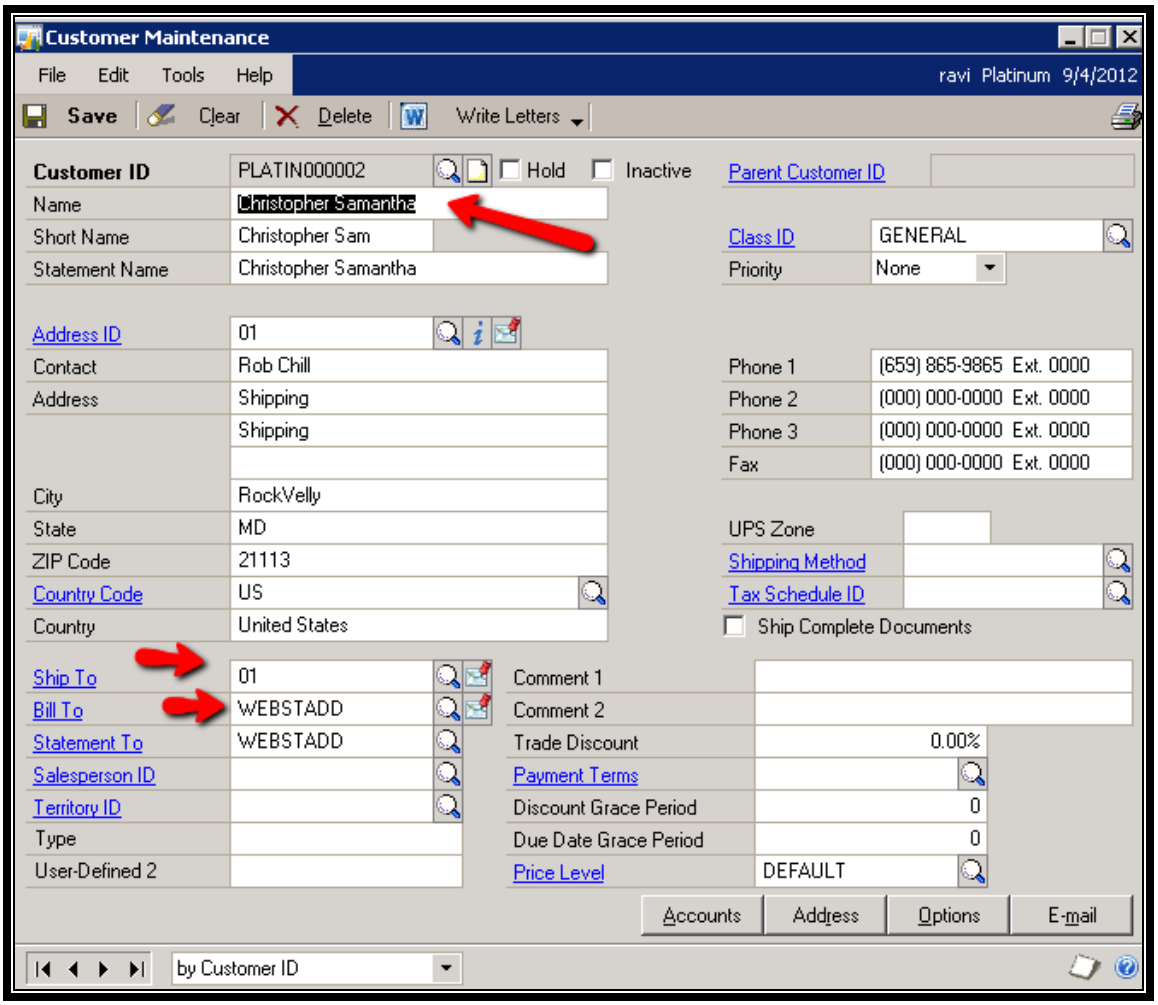

Fig: Different Address Creation for Shipping with WEBSTAAD

- Click **Save**
- Now Open the Same Customer
- Assign Address provided in 01 to **Shipping** by entering '**01'** for **Ship To**
- Click **Save**
- Now again, Open the Same Customer
- You will see the following figure with **WEBSTADD** address assigned to **Billing** & **01** Address is assigned to **Shipping** as shown in the following figure

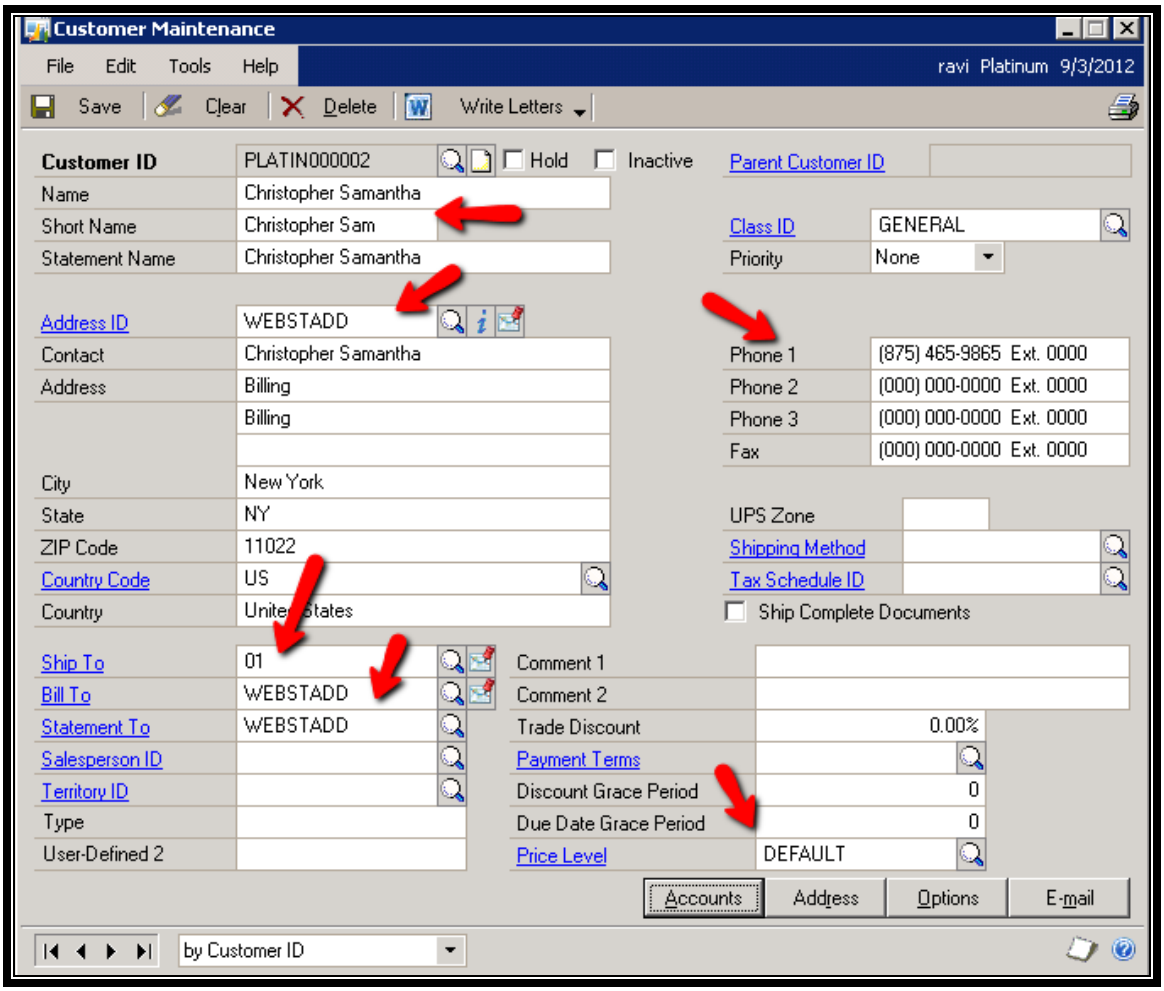

Fig: Address Creation for Shipping with WEBSTADD as Billing Address

- Click **Save**

In order to check back the **Customer Address Creation** in Magento that's been done from **Dynamics GP**, Please follow the navigation

Menu Navigation

- Open **Magento Admin**
- Login to Admin Panel
- Select **Customers → Manage Customer**
- Select the customer that has been updated in Dynamics GP
- Click on **Address** tab which shows the two different addresses that's been created from Dynamics GP as shown in the following figures

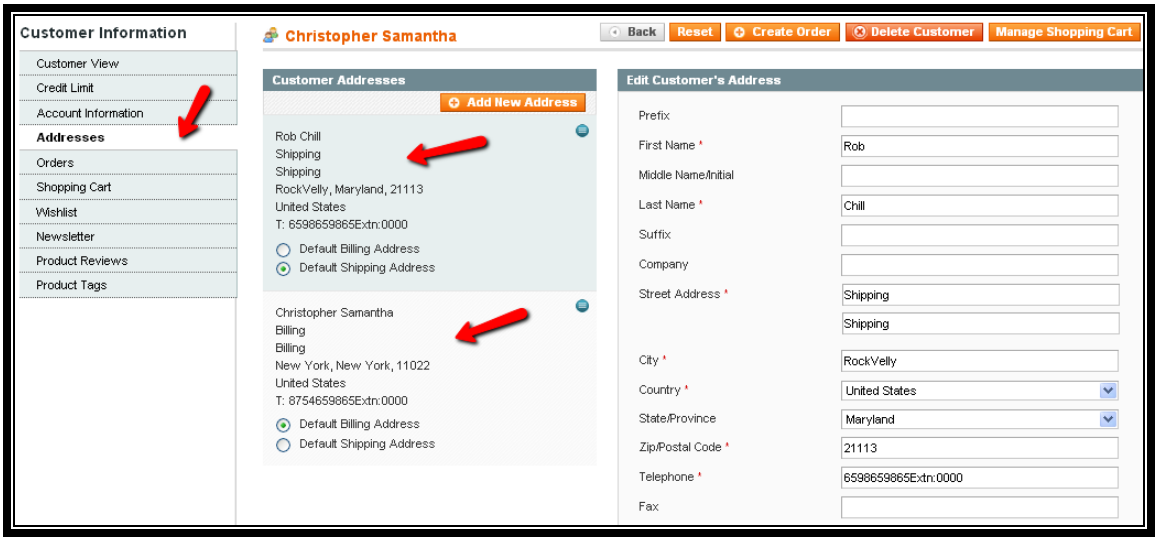

Figure: Addresses Created from GP to Magento

Customer Address Creation without 'WEBSTADD' from GP

Menu Navigation:

- Open **Dynamics GP**
- Select **Sales → Customer**
- Click **Customer** which pops up a **Customer Maintenance** window
- Select the required Customer
- Enter "**01**" in **Address ID** & Provide the Address Details such as **City, Zip Code, Country, State (Short Forms), Phone 1, etc**
- The **"01"** Address that's been created is treated as **Billing Address** as well as **Shipping Address**
- You can see in the following figure where in **Ship To = 01** & **Bill To = 01**

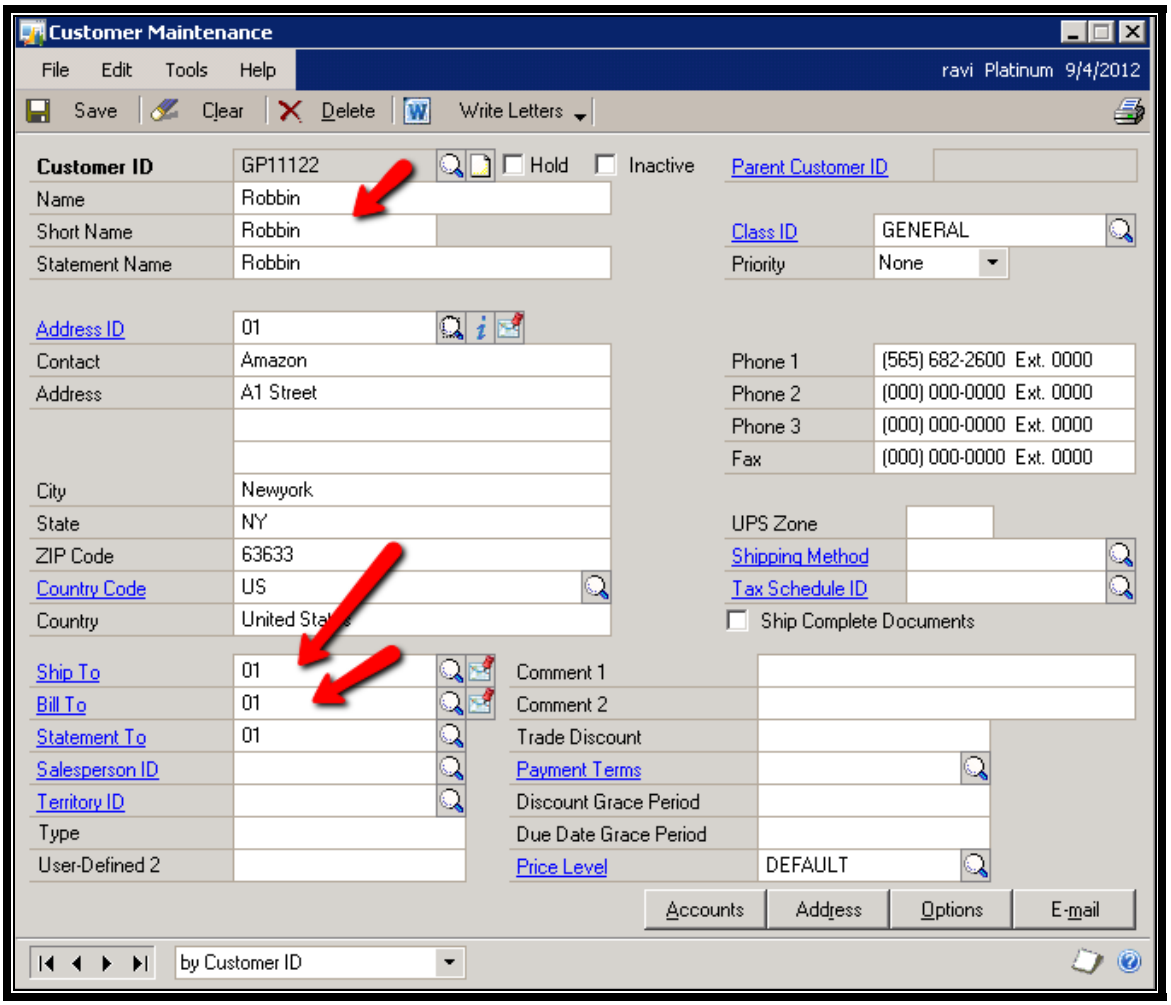

Figure: Customer Creation without WEBSTADD

- Incase if you would like to provide a different address for **Shipping**¸ then Enter "**02**" in **Address ID**
- It' a mandatory that you provide the Address Details such as **City, Zip Code, Country, State (Short Forms), Phone 1, etc**. in Dynamics GP in order to Create a Customer Address Successfully in Magento

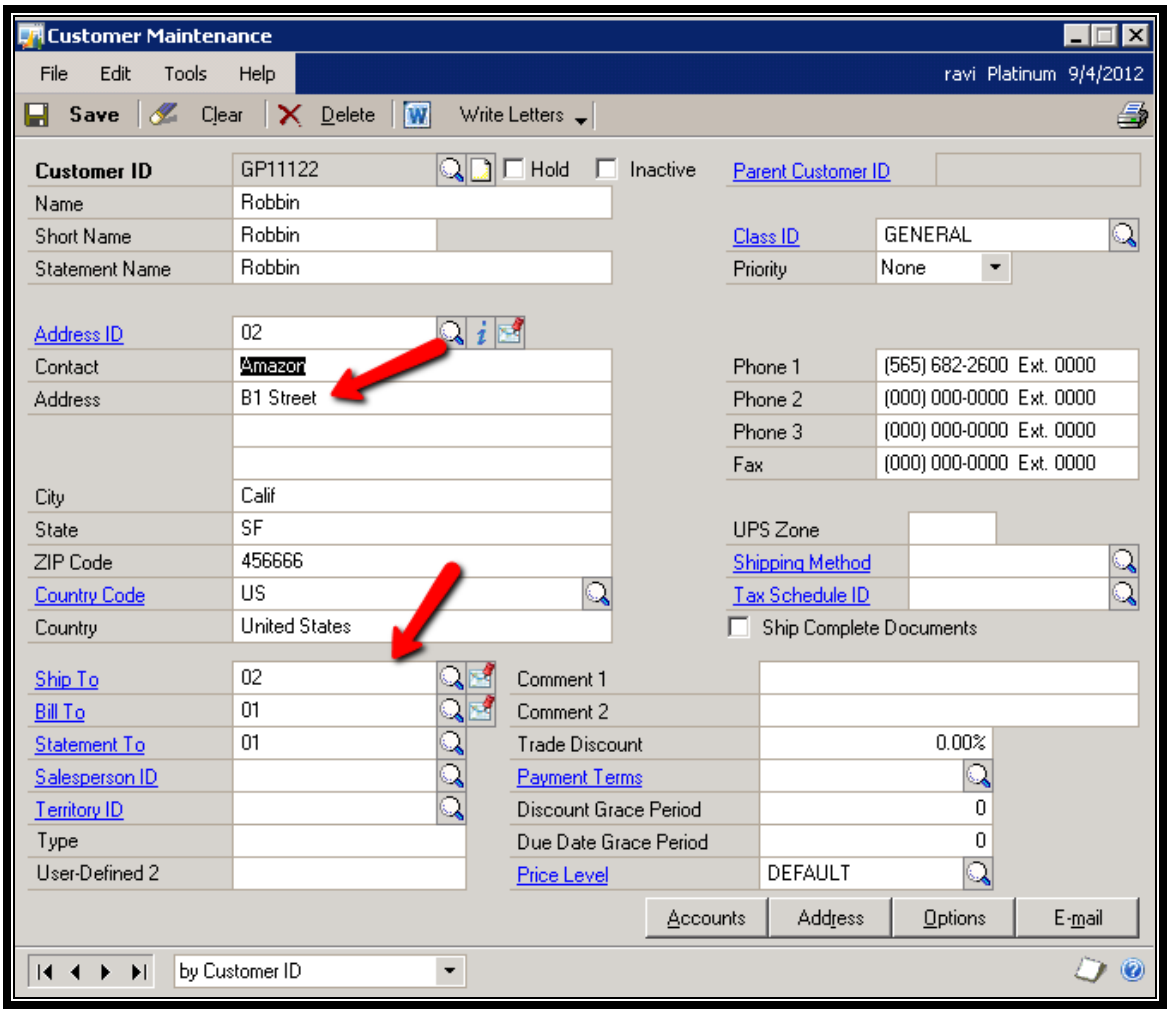

Figure: Different Billing & Shipping Address Creation without WEBSTADD

- Click **Save**
- Now Open the Same Customer
- Assign Address provided in **02** to **Shipping** by entering **02** for **Ship To**
- Click **Save**
- Now Open the Same Customer
- You will see the following figure with different Addresses assigned to **Shipping & Billing Addresses** as shown in the following figure

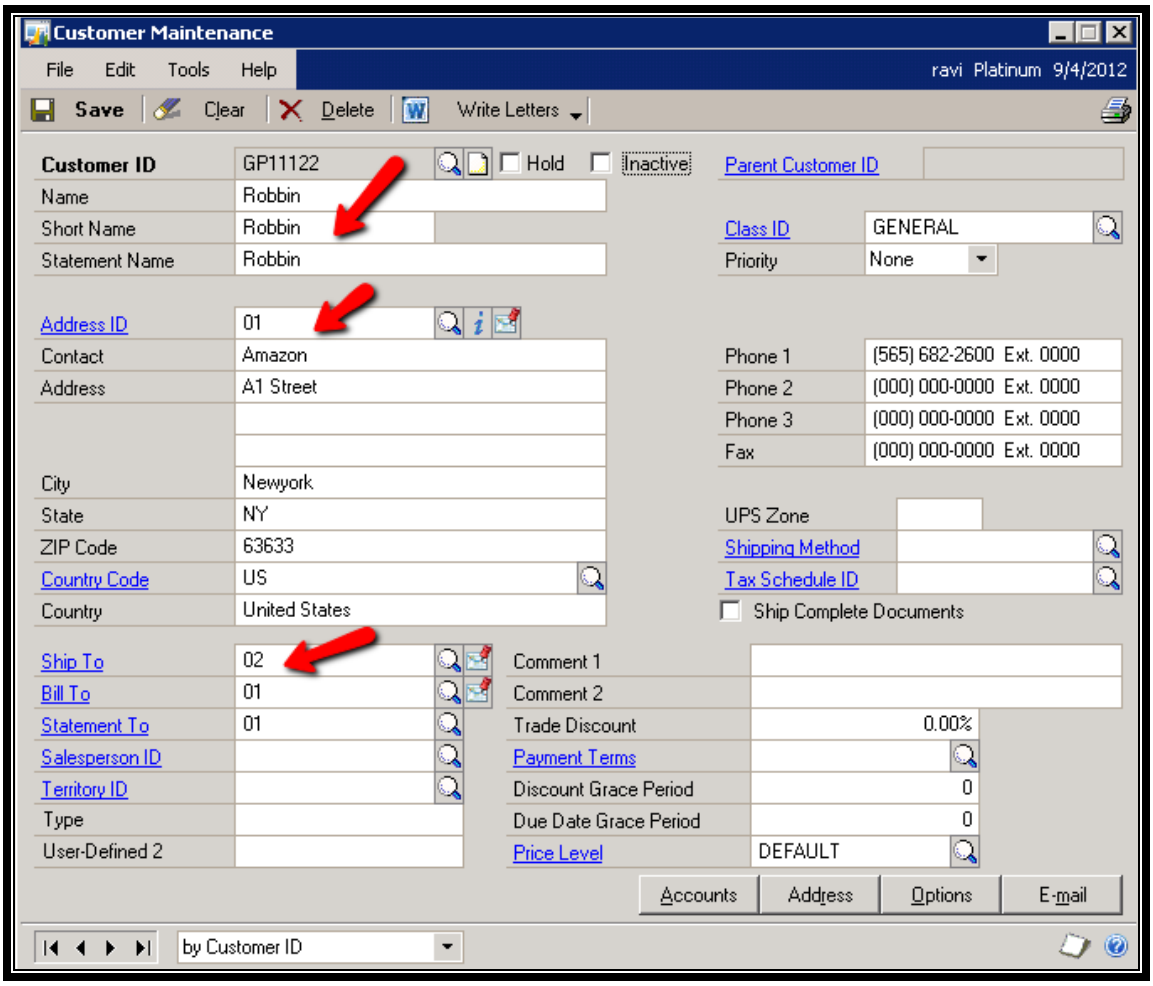

Fig: Different Address Creation from Dynamics GP to Magento

In order to check back the **Customer Address Creation** in Magento that's been done from **Dynamics GP**, Please follow the navigation

Menu Navigation

- Open **Magento Admin**
- Login to Admin Panel
- Select **Customers → Manage Customer**
- Select the customer that has been updated in Dynamics GP
- Click on **Address** tab which shows the Address details created from Dynamics GP as shown in the following figure

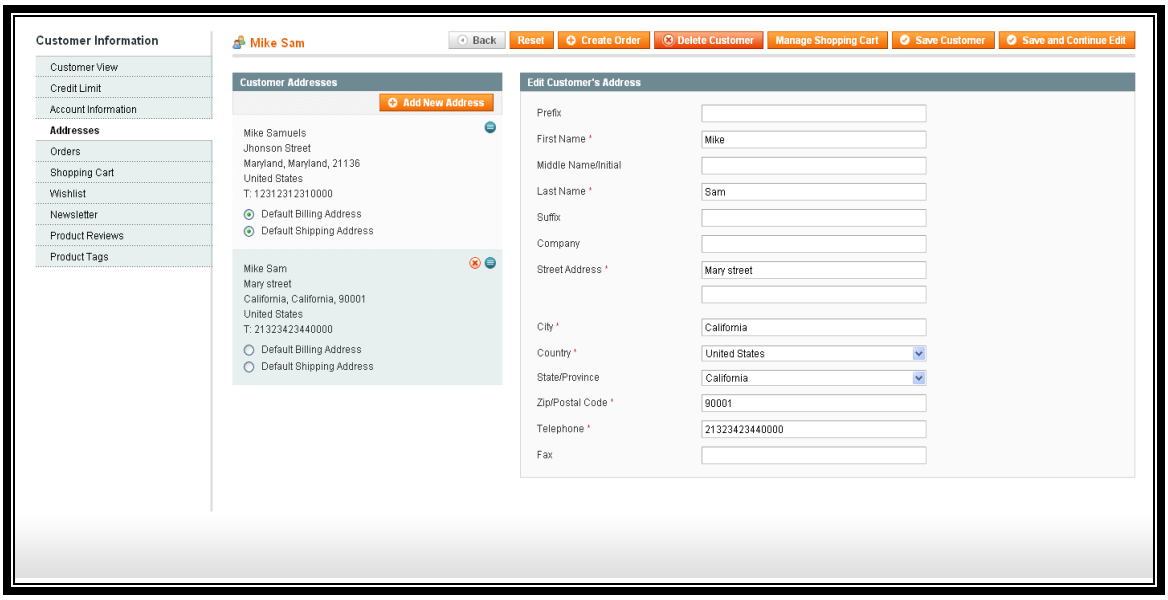

Figure: Addresses Created from GP to Magento

Customer Address Update from GP

Customer Address Update with 'WEBSTADD' from GP

Menu Navigation:

- Open **Dynamics GP**
- Select **Sales → Customer**
- Click **Customer** which pops up a **Customer Maintenance** window
- Select the required Customer
- Enter "**WEBSTADD**" in **Address ID** & Update the Address Details such as **City, Zip Code, Country, State (Short Forms), Phone 1, etc**
- You can even update the email address by Clicking '**i**' symbol which is next to Address Search icon as shown in the above section i.e. **Customer Creation from GP with WEBSTAAD**
- In this scenario i.e. **Customer Address Update** with **WEBSTADD,** the **WEBSTAAD Address** is treated as **Billing Address** as **Shipping Address** as shown in the following figure

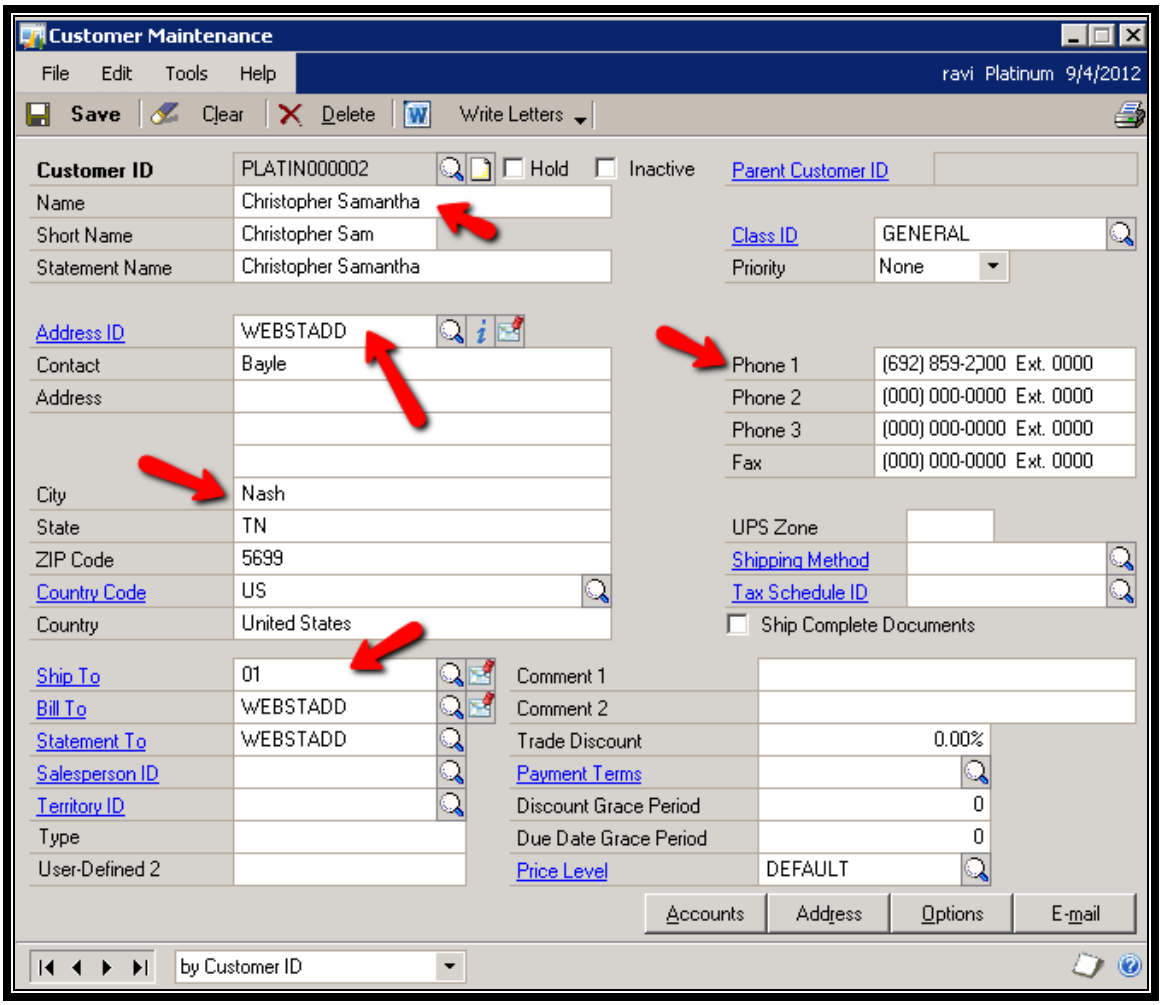

Fig: Customer Address Update with WEBSTAAD from Dynamics GP

- Incase if you would like to update the address for **Shipping**, then Enter "**01**" in **Address ID** & Update the Address Details such as **City, Zip Code, Country, State (Short Forms), Phone 1, etc** as shown in the following figure

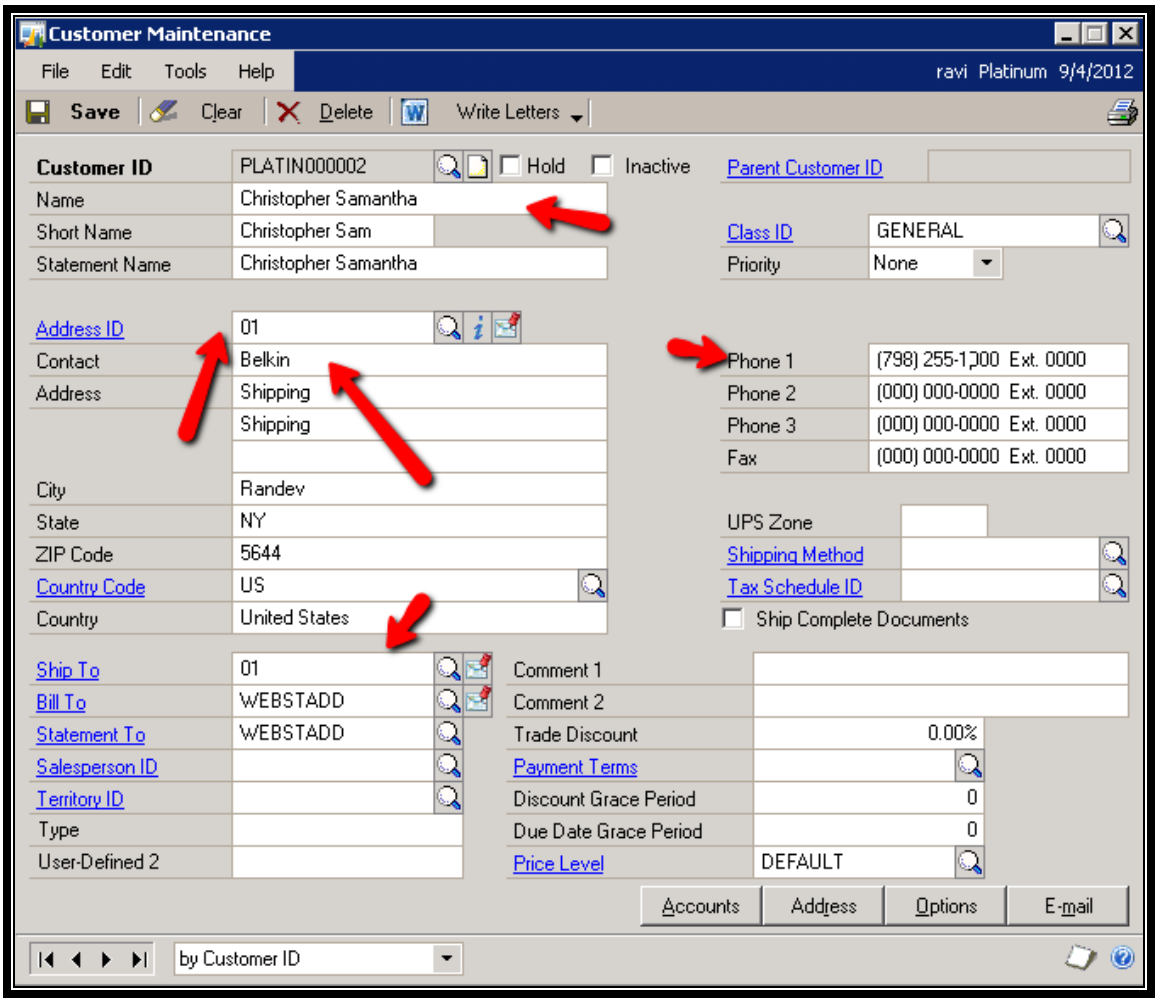

Fig: Different Address Creation for Shipping with WEBSTAAD

- Click **Save**

In order to check back the **Customer Address Update [With WEBSTADD]** in Magento that's been done from **Dynamics GP**, Please follow the navigation

Menu Navigation

- Open **Magento Admin**
- Login to Admin Panel
- Select **Customers → Manage Customer**
- Select the customer that has been updated in Dynamics GP

- Click on **Address** tab which shows the two different addresses that's been created from Dynamics GP as shown in the following figures

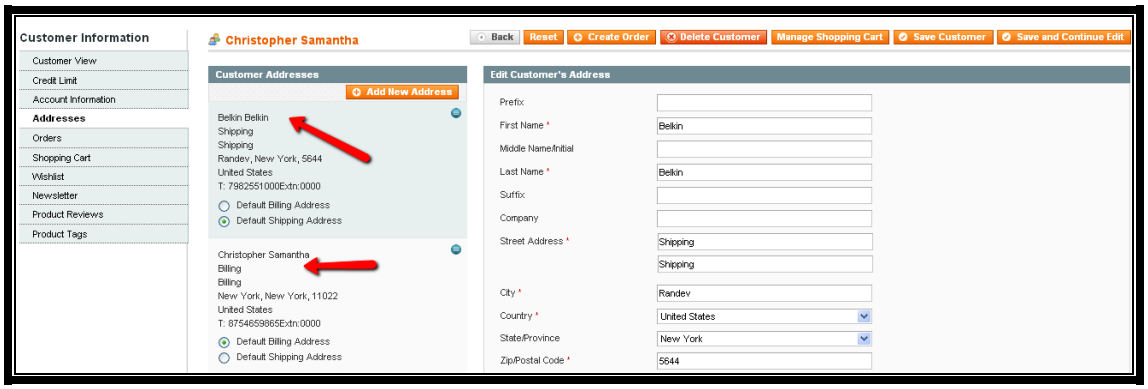

Figure: Updated Address from GP to Magento

Customer Address Creation without 'WEBSTADD' from GP

Menu Navigation:

- Open **Dynamics GP**
- Select **Sales → Customer**
- Click **Customer** which pops up a **Customer Maintenance** window
- Select the required Customer
- Enter "**01**" in **Address ID** & Update the Address Details such as **City, Zip Code, Country, State (Short Forms), Phone 1, etc**

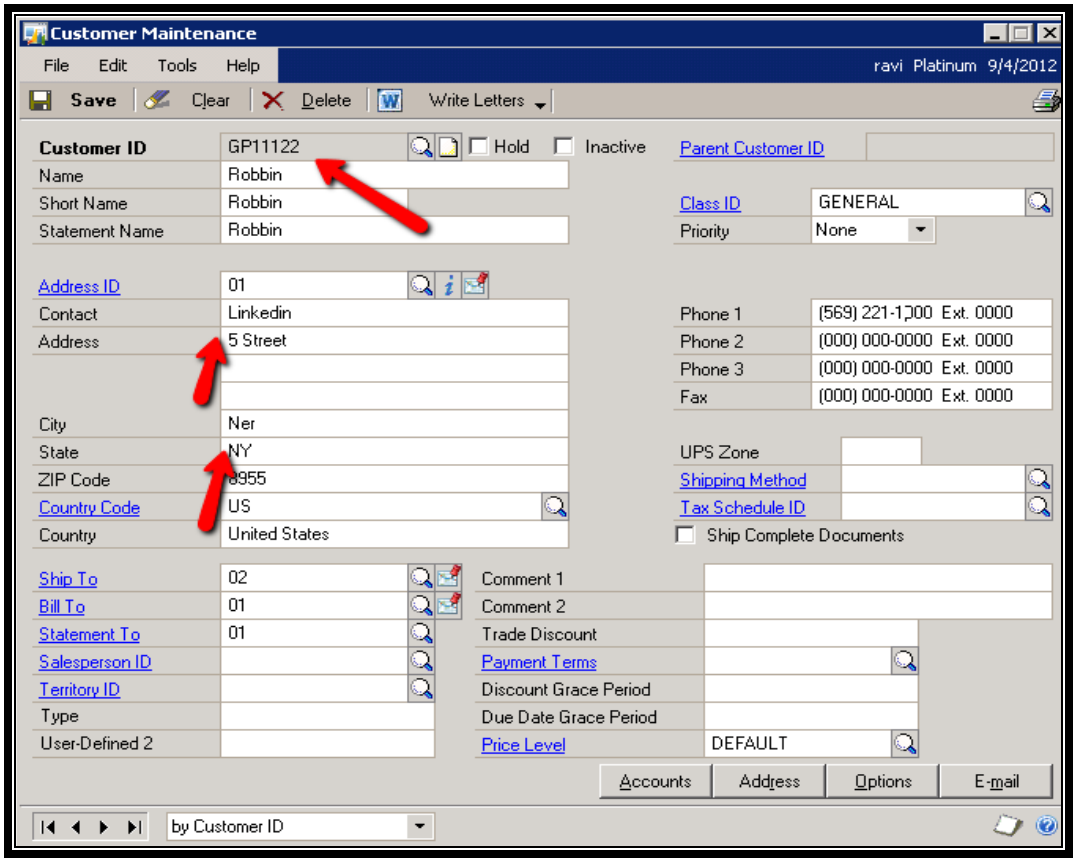

Figure: Customer Address Creation without WEBSTADD

- Incase if you would like to provide a different address for **Shipping**, then Enter "**02**" in **Address ID** & Update the Address Details such as **City, Zip Code, Country, State (Short Forms), Phone 1, etc** as shown in the following figure

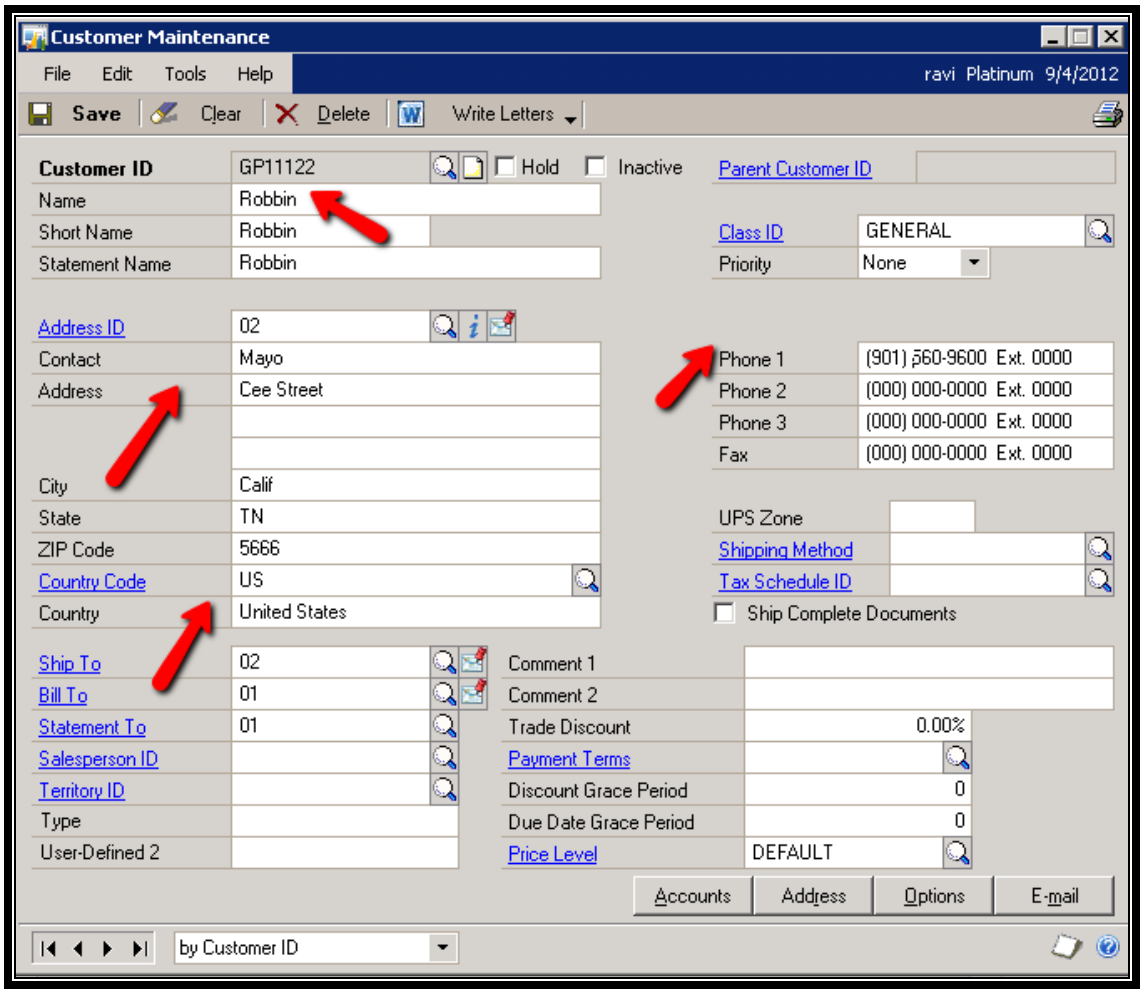

Figure: Different Billing & Shipping Address Creation without WEBSTADD

- Click **Save**

In order to check back the **Customer Address Update [Without WEBSTADD]** in Magento that's been done from **Dynamics GP**, Please follow the navigation

Menu Navigation

- Open **Magento Admin**
- Login to Admin Panel
- Select **Customers → Manage Customer**
- Select the customer that has been updated in Dynamics GP
- Click on **Address** tab which shows the Address details created from Dynamics GP as shown in the following figure

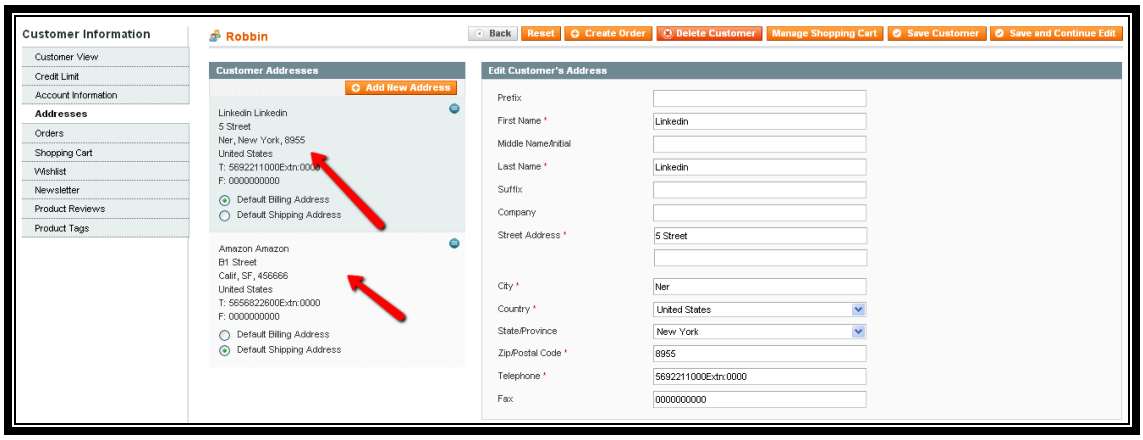

Figure: Updated Address from GP to Magento

Order Creation from GP

Menu Navigation:

- Open **Dynamics GP**
- Select **Sales Card → Sales Transaction Entry**
- Select **Type/Type ID → Order**
- Tab on **Document No** and you will see an auto generated number for Document No
- Select the required **Customer ID**, **Currency ID, Batch ID** and **Ship to Address**

  Note: We support only two **Batch ID** types i.e. **Sales Order** and **Sales Back Order**
- Select the **Item Number, UofM, Quantity Ordered, Price Level & Shipping Method**
- Enter the **Fright Charges & Amount Received** as shown in the following figure

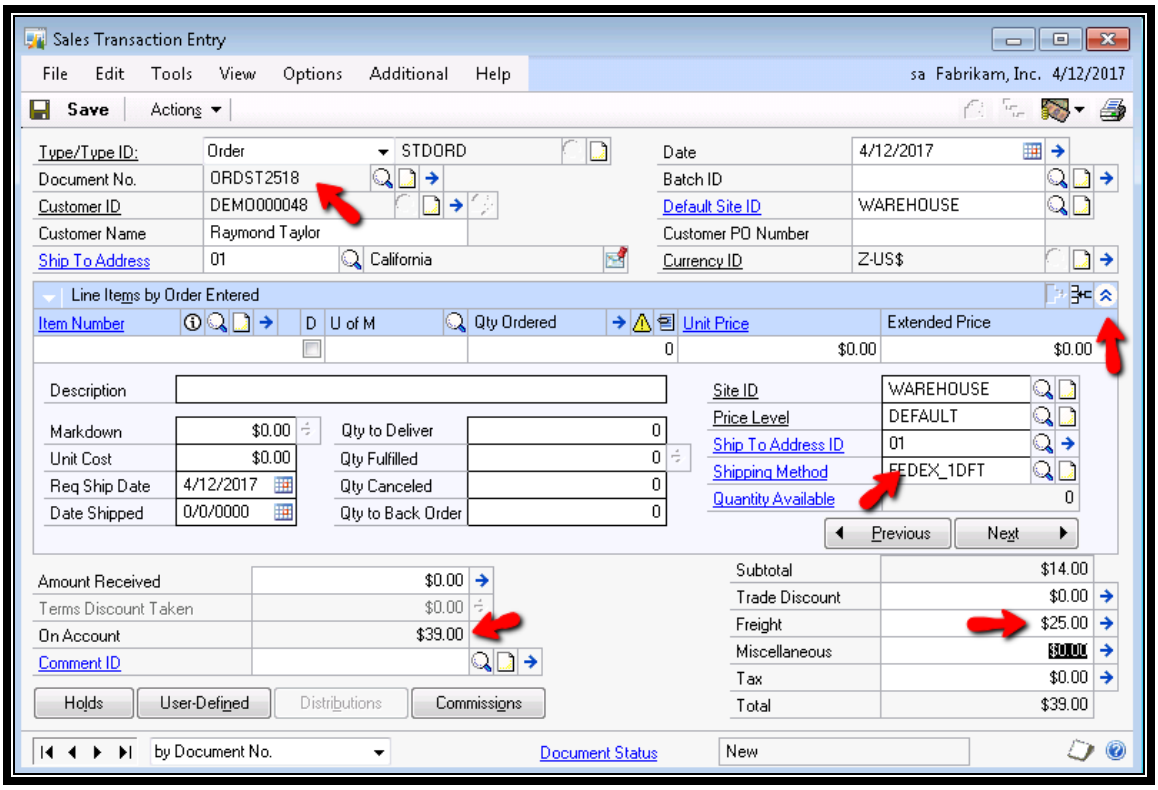

Fig: Order Creation from GP

- Once you place an Order from Dynamics GP, you will see the Amount in **On Account** column
- You need to make it to **Amount Received** & it can be done by Cash or Check or Credit Card Payment
- Click the arrow mark which is next to the **Amount Received** which pops up **Sales Payment Entry** window
- Enter the **Amount Received** & Select the required **Payment Method** option as shown in the following figure
- Provide required **Credit Card Details** or **Check Details**
  Note: We only support **Credit Card Payment, Cash Deposit, & Check**
- Click **Insert**
- Click **OK** which will take you to the previous screen

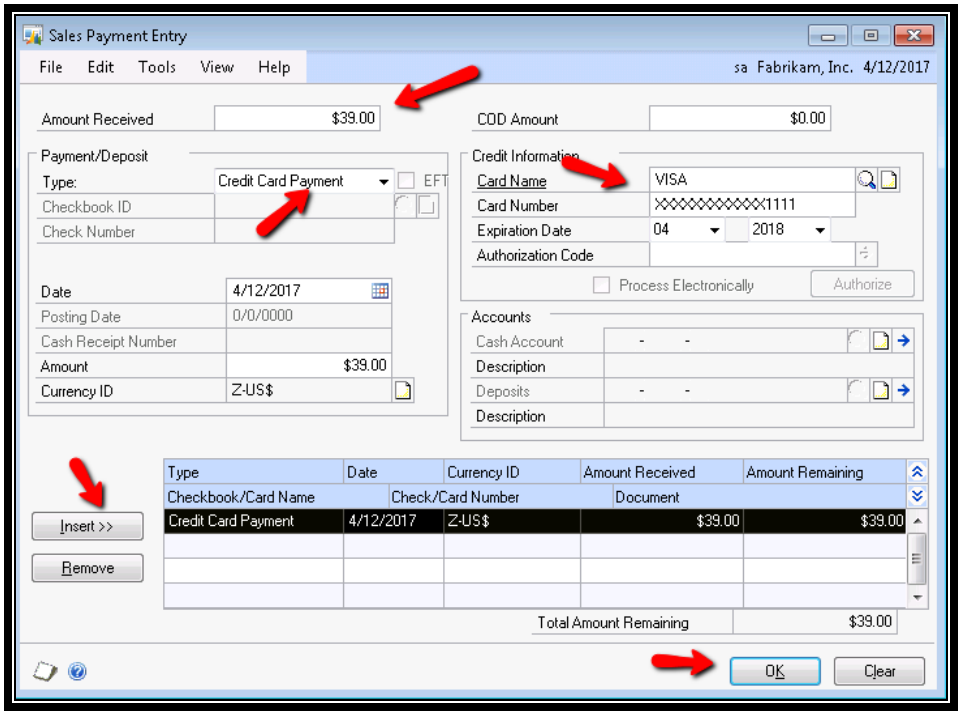

Fig: Providing Credit Card Details for an Order from GP

- Now you will see the amount transferring from **On Account** to **Account Received** as shown in the following figure

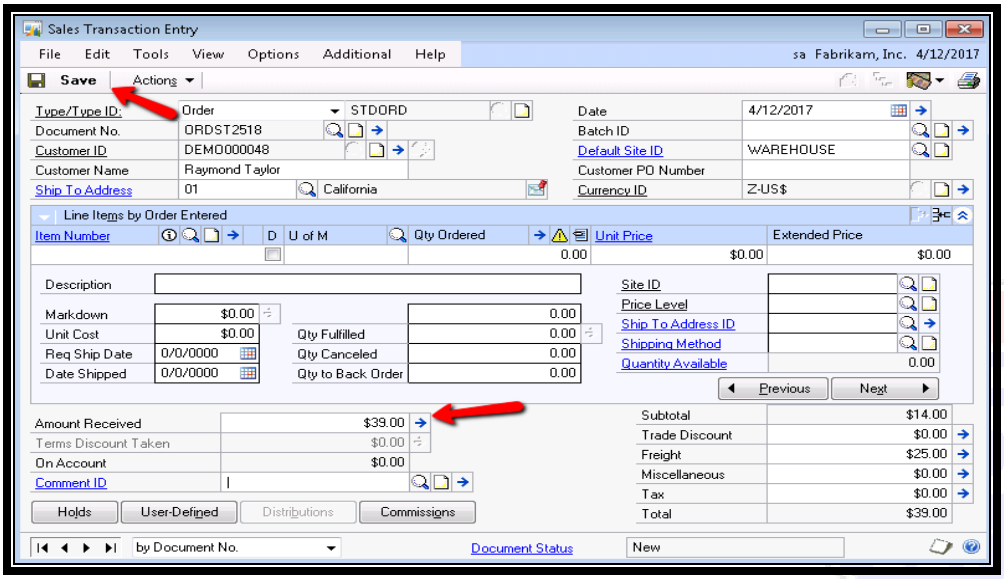

Fig: Amount Received over for an Order Dynamics GP

- Click **Save**

In order to check back the **Order Creation** in Magento that's been done from **Dynamics GP,** Please follow the navigation

Menu Navigation

- Open **Magento Admin**
- Login to Admin Panel
- Select **Sales → Orders → Order ID**
- You will see the required Order Information in Magento that's been created from Dynamics GP as shown in the following figure

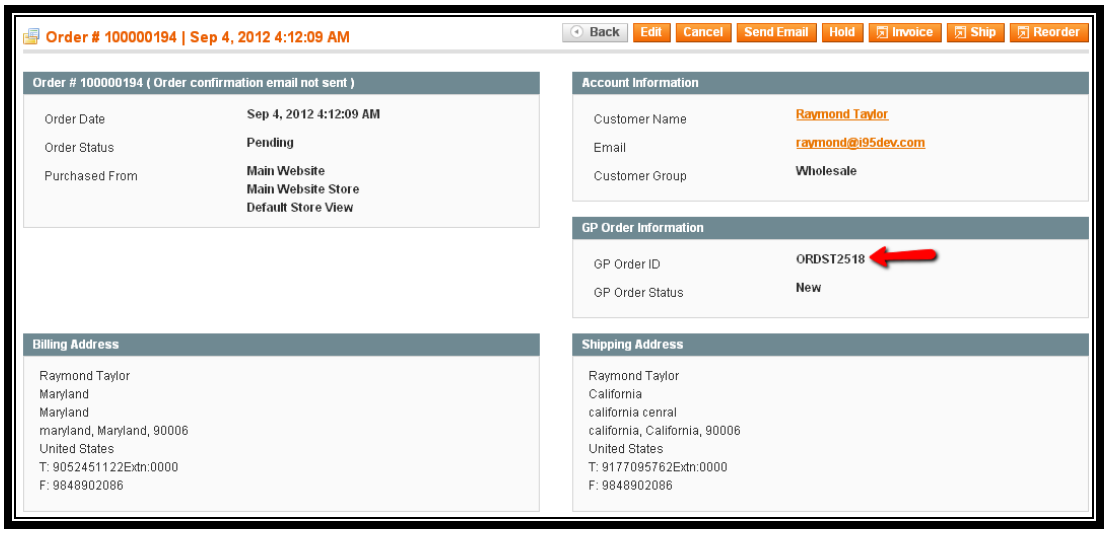

Fig: Order Created from GP

GP to Magento Inventory (Qty, Weight, Price, and Cost) Update

Menu Navigation:

- Open **Dynamics GP**

- Select **Inventory → Items** which pops up an **Item Maintenance** window
- Select required **Item** that you would like update **Inventory** for
- Check the **Quantity on Hand & Available** of an Item prior updating the Inventory

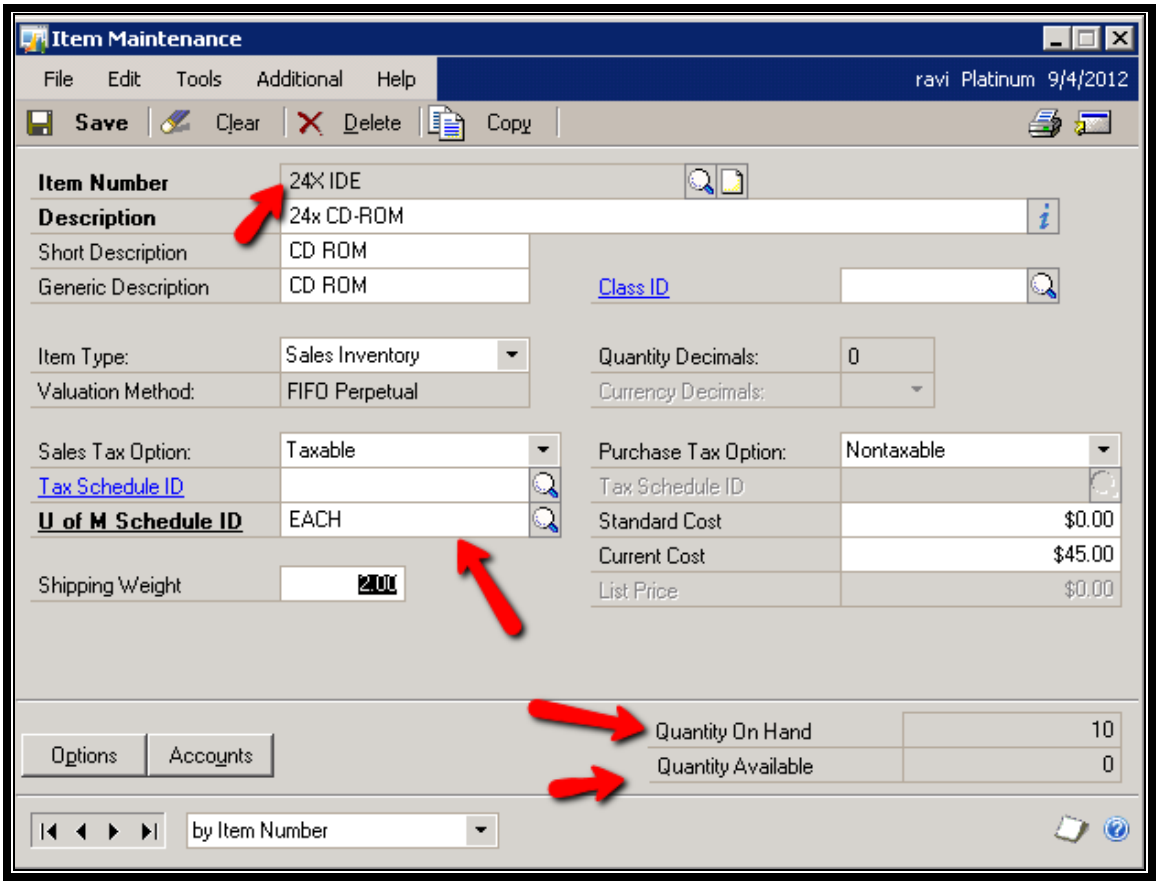

Fig: Inventory of an Item in Dynamics GP

- Now Go to **Purchasing**
- Select **Purchasing → Purchase Order Entry** which pops up **Purchase Order Entry** window
- Select **Type = Standard** & **Currency ID = USD**
- Select the required **Vendor ID, Buyer ID, etc**
- Select the required **Item, UofM [Only Each]** & Provide the required **Quantity** as shown in the following figure
- Remember the **PO Number**. In case, if you don't remember the last PO Number would be the recent one

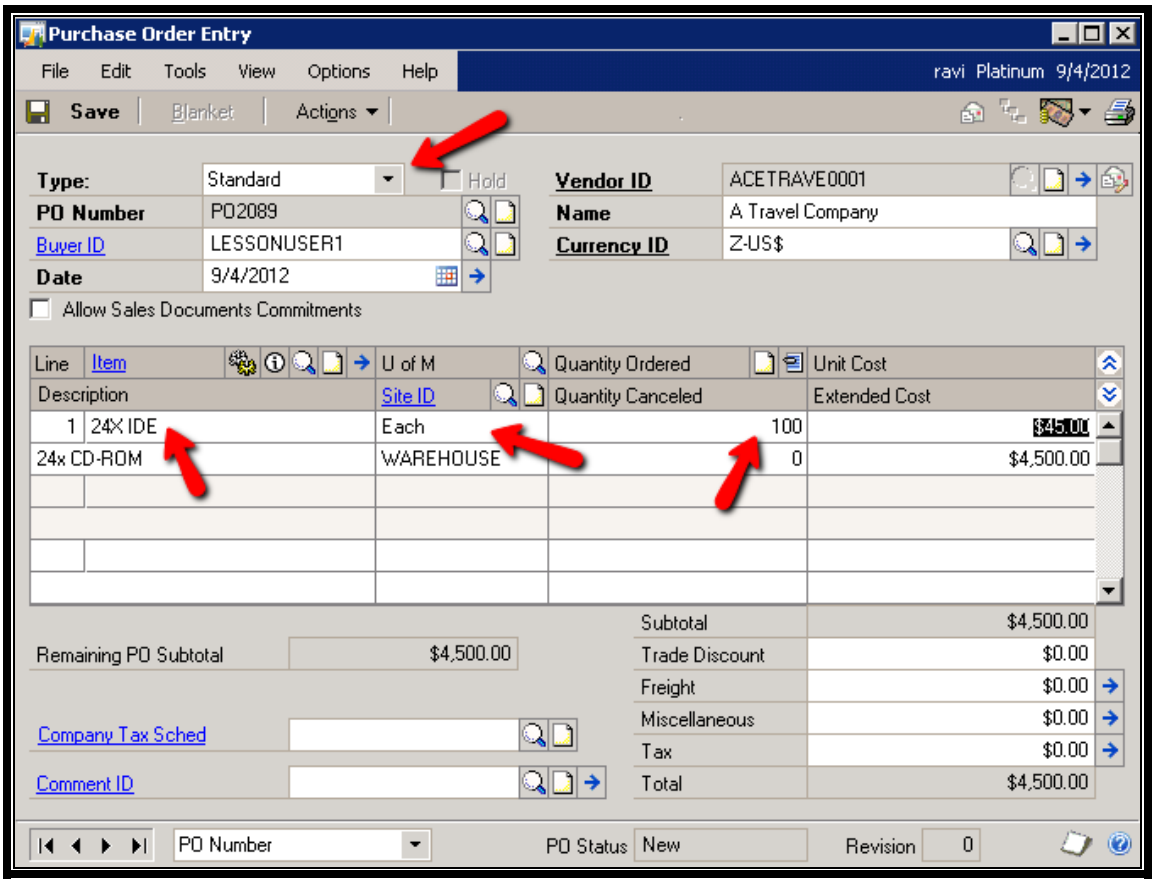

Fig: Generating Purchase Order for an Item

- Click **Save** & Close the Purchase Order Entry window
- Now, Select **Purchasing → Receiving Transaction Entry** which pops up **Receiving Transaction Entry** window
- Provide Vendor ID, PO Number, Item and other required fields as shown in the following figure

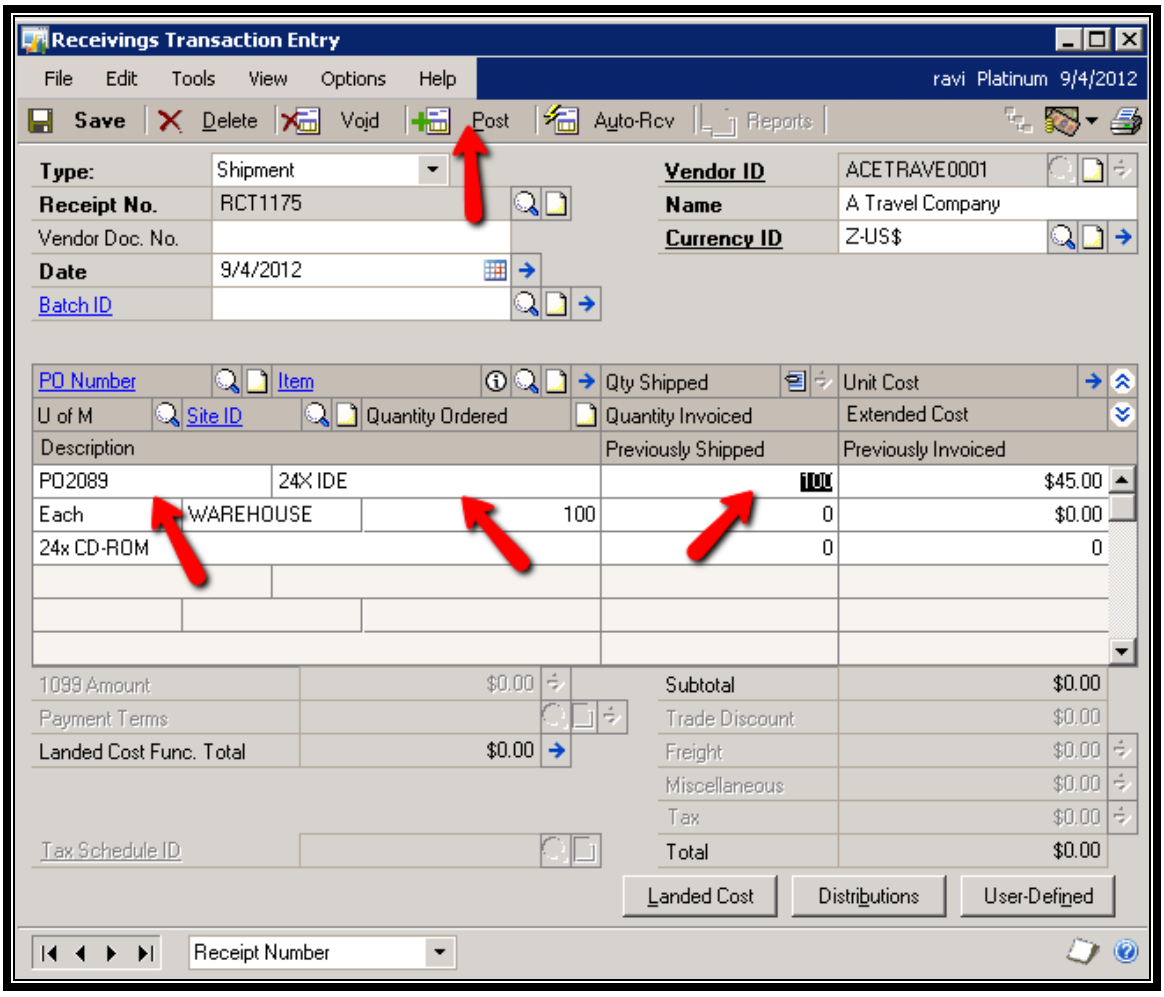

Fig: Posting Purchase Order for an Item

- Make sure, you remove any kind of **Batch ID** in the above screen
- Click on **Post**
- In order to check back the Inventory updated for the same item in Dynamics GP, follow the navigation mentioned
- Select **Inventory → Items** which pops up an **Item Maintenance** window
- Select required Order that you would like update Inventory for
- Check the Quantity on Hand & Available
- You will see the updated inventory for the same item

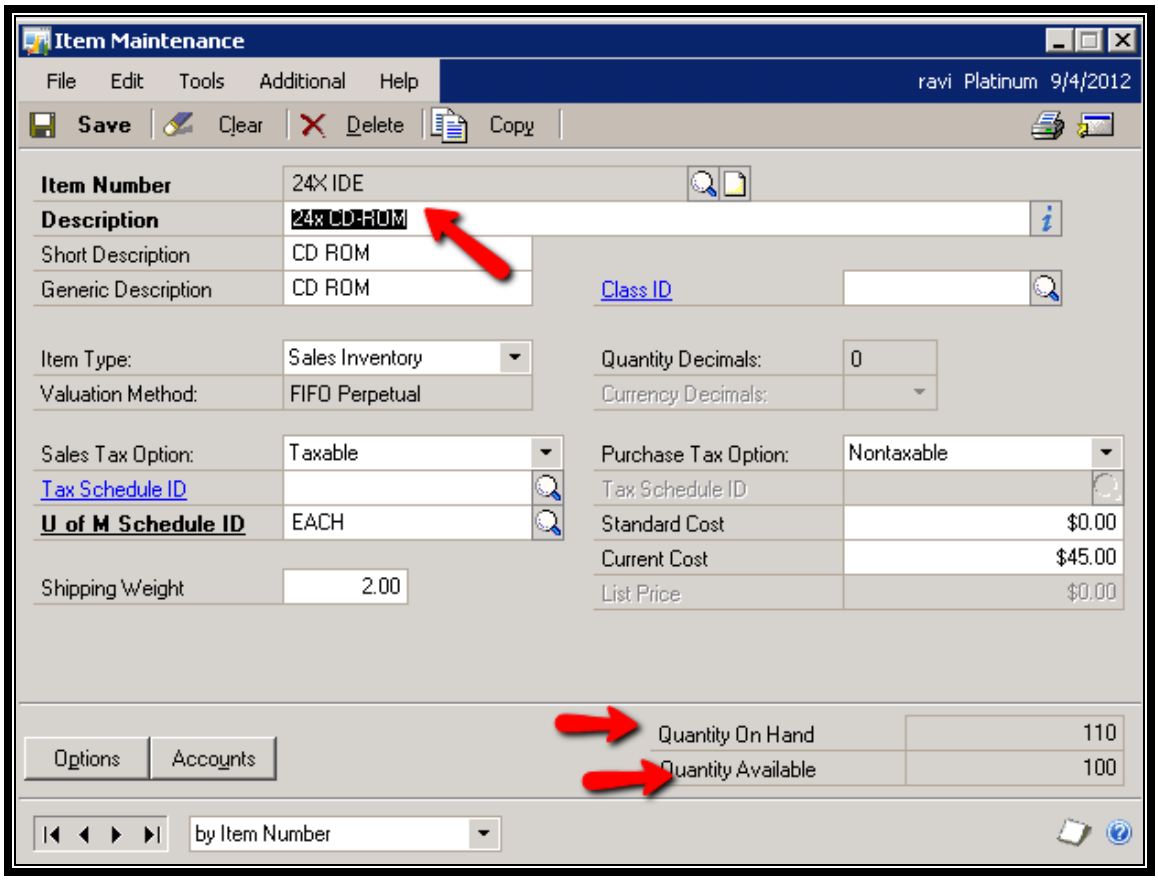

Fig: Updated Inventory Check for an Item in Dynamics GP

In order to check back the **Inventory Update for a Product** in Magento that's been done from **Dynamics GP,** Please follow the navigation

Menu Navigation

- Open **Magento Admin**
- Login to Admin Panel
- Select **Catalog → Manage Products**
- Search for the required Product & Open
- You will see the required inventory Information in Magento that's been updated from Dynamics GP as shown in the following figure

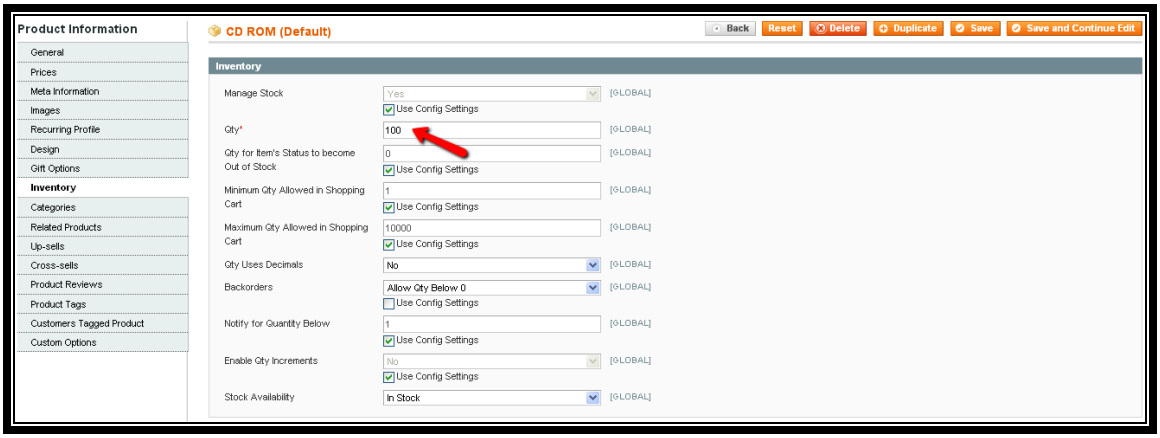

Fig: Updated Inventory Check for an Item in Magento

Order Status from GP to Magento

Note: This Order Processing is common for both **Registered Customers** & **Guest Checkout** from Magento

Order Status → New:

Whenever you create an Order from Magento or Dynamics GP, the **Order Status** would be **New.**

In order to check the Order Status Changing at Magento as and when an Order undergoes through the Fulfillment process at Dynamics GP, please follow the navigation shown below:

Menu Navigation:

- Open **Dynamics GP**
- Select **Sales Card → Sales Transaction Entry**
- Select **Order → Order Number** as shown in the following figure

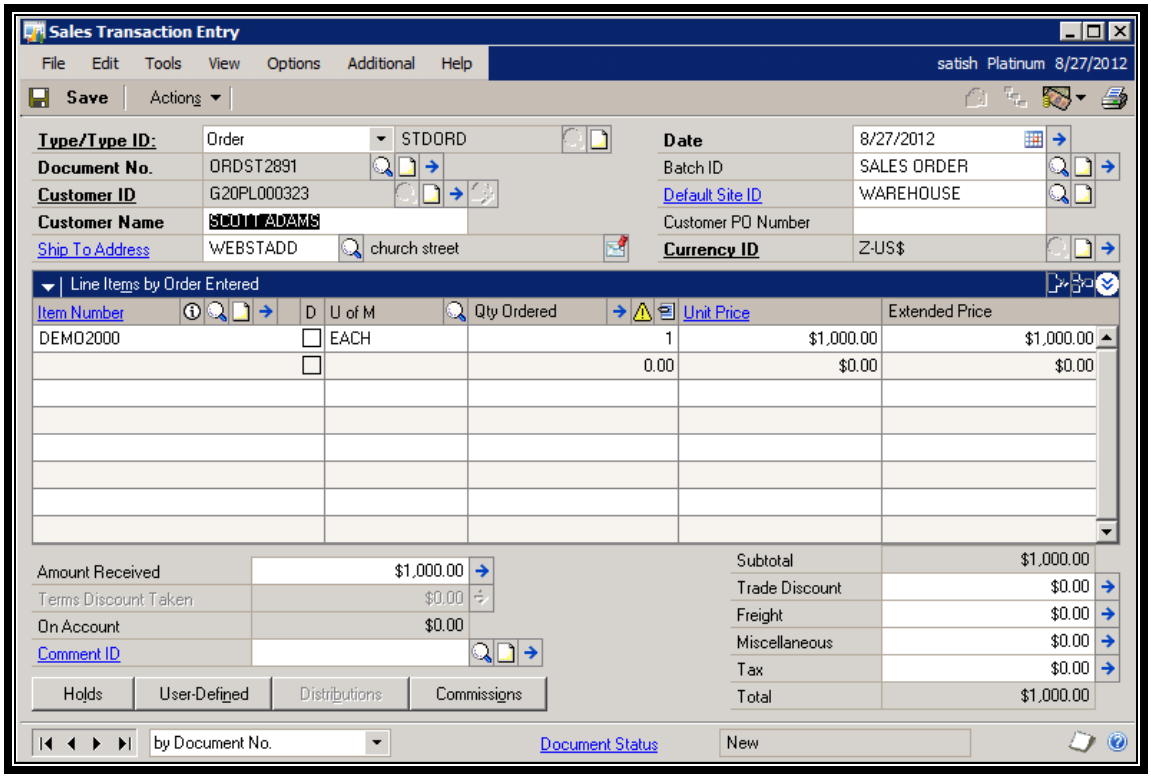

Fig: Order Created

- In order to check the **New** Status at Magento Admin, follow the navigation
- Open **Magento Admin**
- Login to Admin Panel
- Select **Sales → Order**
- Select the required Order & Open
- It will show the following screen which provides the Order Status as **New**

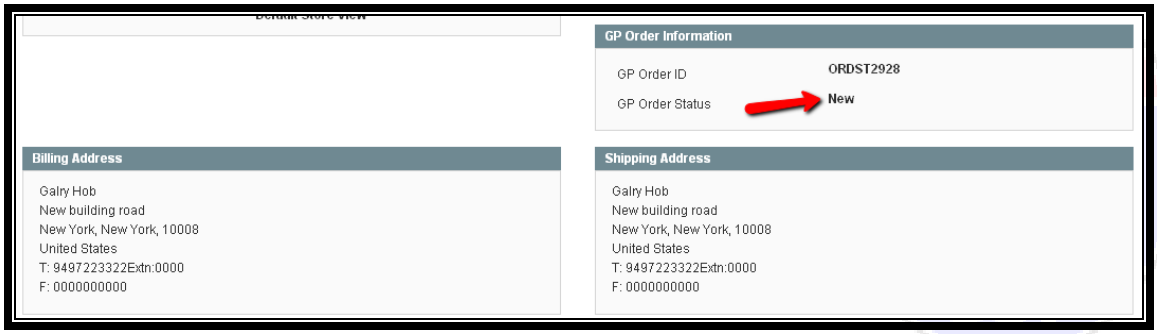

Fig: Order Status (New) in Magento

Order Status → Ready to Print Picking Ticket:

- Select **Action → Transfer to Invoice** which opens up a **Sales Transfer Documents** as shown in the following figure
- Check the '**Transfer to Invoice'** & '**Include Totals and Deposits'** option
- Click **Transfer**

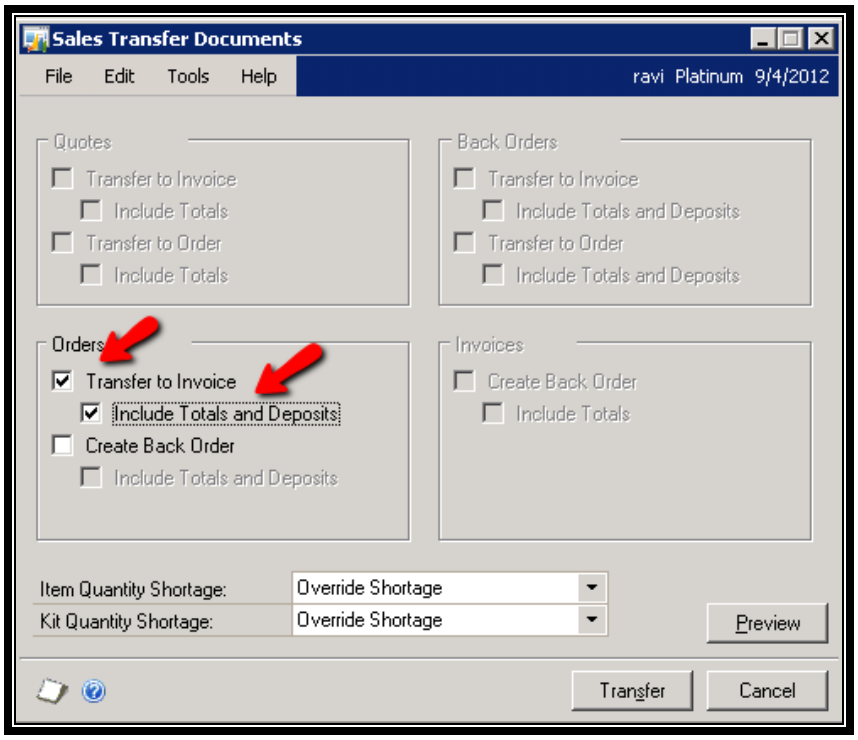

Fig: Transfer to Invoice

- Once you Click **Transfer** , you will get a **Report Destination** window
- Check mark the **Screen** or **Printer** depending on your requirement

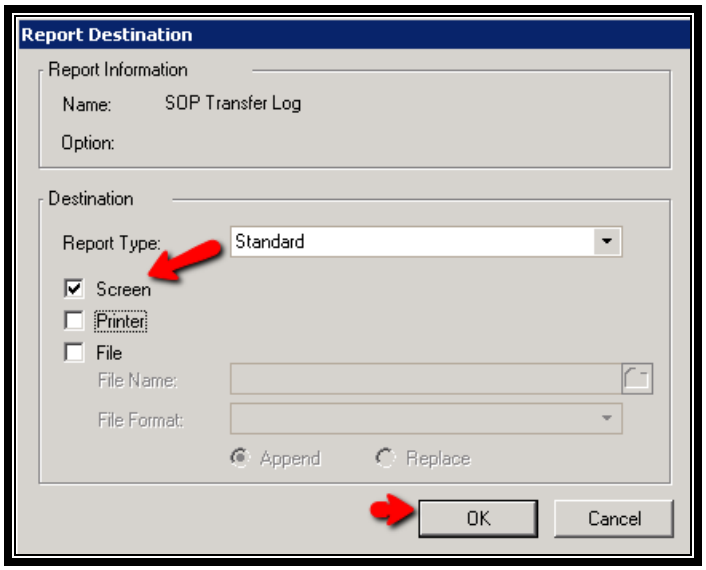

Fig: Printing Reports

- Click **Ok**
- **Fulfillment Order** gets created with new **Document No**
- Remember the **Document No** as shown in the following figure

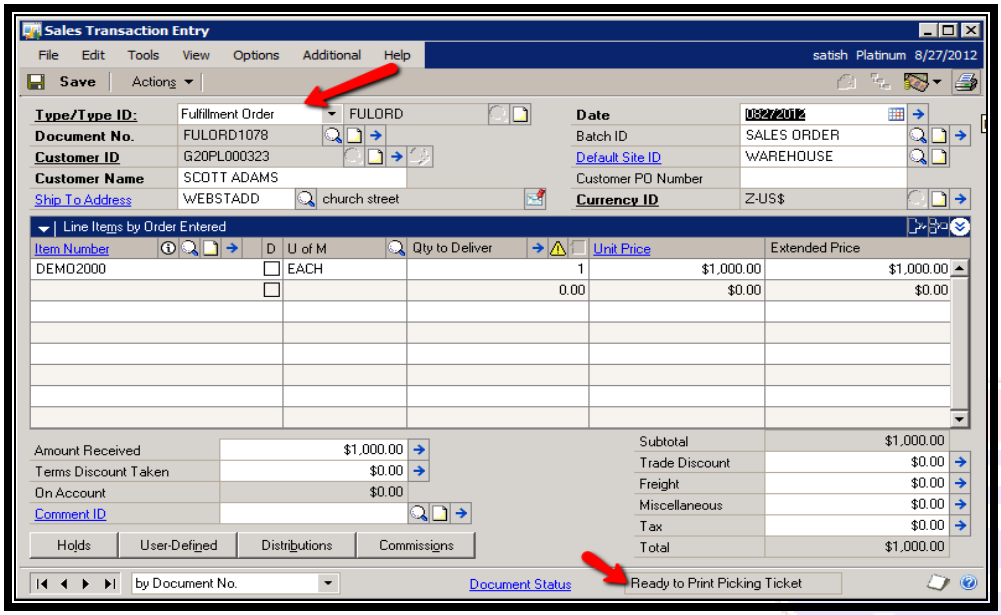

Fig: Fulfillment Order

- Now, Go to **Sales → Sales Order Transactions → Advanced Distribution Transactions** as shown in the following figure

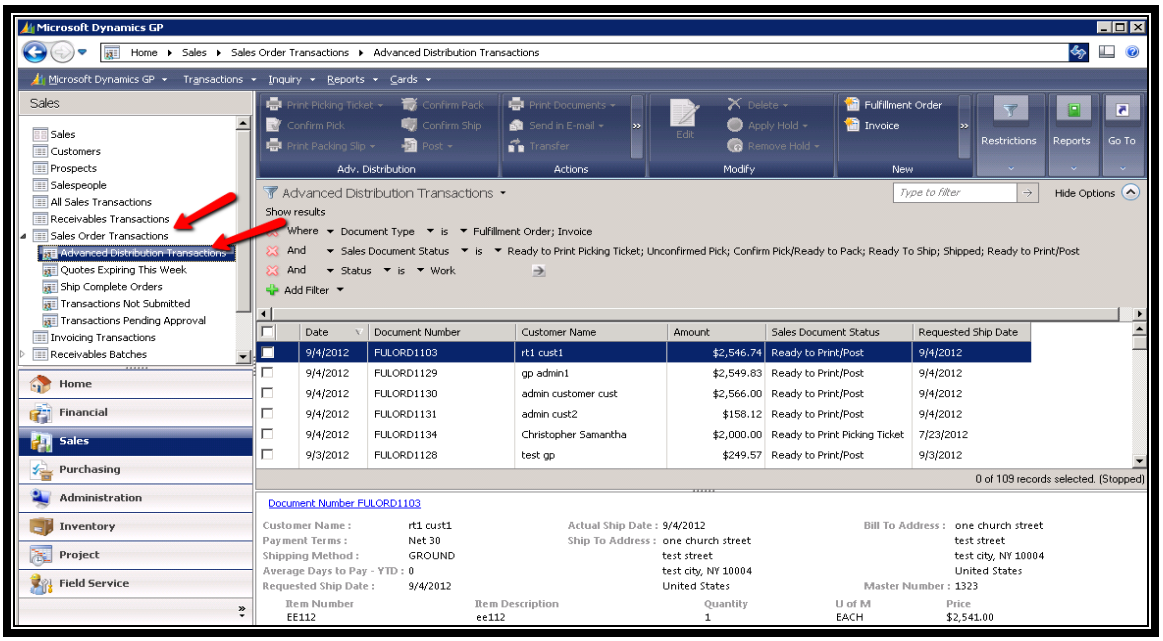
Microsoft Dynamics GP
Home ▸ Sales ▸ Sales Order Transactions ▸ Advanced Distribution Transactions
Sales
Sales
Customers
Prospects
Salespeople
All Sales Transactions
Receivables Transactions
Sales Order Transactions
Advanced Distribution Transactions
Quotes Expiring This Week
Ship Complete Orders
Transactions Not Submitted
Transactions Pending Approval
Invoicing Transactions
Receivables Batches
Home
Financial
Sales
Purchasing
Administration
Inventory
Project
Field Service
Advanced Distribution Transactions
Show results
Where Document Type is Fulfillment Order; Invoice
And Sales Document Status is Ready to Print Picking Ticket; Unconfirmed Pick; Confirm Pick/Ready to Pack; Ready To Ship; Shipped; Ready to Print/Post
And Status is Work
Add Filter
Hide Options
Date | Document Number | Customer Name | Amount | Sales Document Status | Requested Ship Date
9/4/2012 | FULORD1103 | rt1 cust1 | $2,546.74 | Ready to Print/Post | 9/4/2012
9/4/2012 | FULORD1129 | gp admin1 | $2,549.83 | Ready to Print/Post | 9/4/2012
9/4/2012 | FULORD1130 | admin customer cust | $2,566.00 | Ready to Print/Post | 9/4/2012
9/4/2012 | FULORD1131 | admin cust2 | $158.12 | Ready to Print/Post | 9/4/2012
9/4/2012 | FULORD1134 | Christopher Samantha | $2,000.00 | Ready to Print Picking Ticket | 7/23/2012
9/3/2012 | FULORD1128 | test gp | $249.57 | Ready to Print/Post | 9/3/2012
0 of 109 records selected. (Stopped)
Document Number FULORD1103
Customer Name : rt1 cust1
Payment Terms : Net 30
Shipping Method : GROUND
Average Days to Pay - YTD : 0
Requested Ship Date : 9/4/2012
Actual Ship Date : 9/4/2012
Ship To Address : one church street
test street
test city, NY 10004
United States
Bill To Address : one church street
test street
test city, NY 10004
United States
Master Number : 1323
Item Number | Item Description | Quantity | U of M | Price
EE112 | ee112 | 1 | EACH | $2,541.00

Fig: Advanced Distribution Transactions

- Select the same **Fulfillment Document No**
- Order Status gets changed to **Ready to Print Picking Ticket** in Dynamics GP
- In order to check the **Ready to Print Picking Ticket** Status at Magento Admin, follow the navigation
- Open **Magento Admin**
- Login to Admin Panel
- Select **Sales → Order**
- Select the required Order & Open
- It will show the following screen which provides the Order Status as **Ready to Print Picking Ticket**

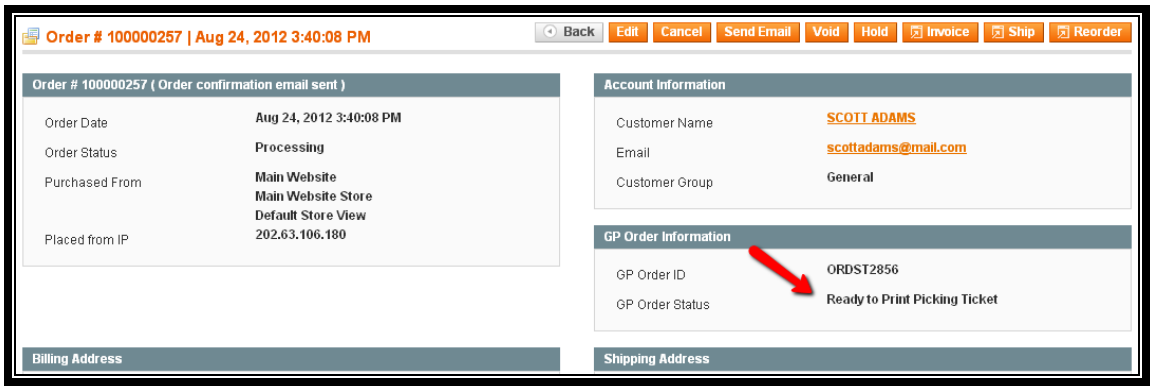

Fig: Order Status (Ready to Print Picking Ticket) in Magento

Order Status →Unconfirmed Pick:

- Click on the checkbox to select the **Fulfillment** Order
- Click on **Print Picking Ticket** as shown in the below figure

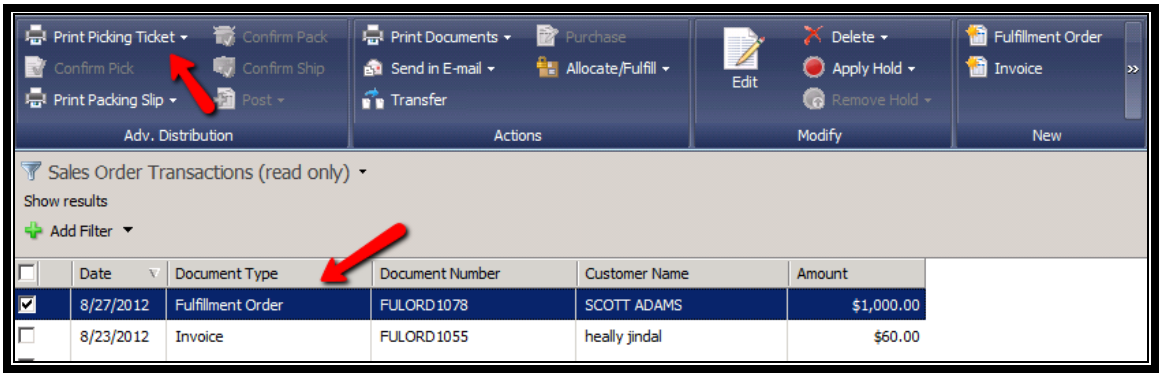

Fig: Print Picking Ticket

- A pop up window opens up
- Check Mark for **Print Separate Picking Ticket for Site**
- Click **Print** as shown in the below figure

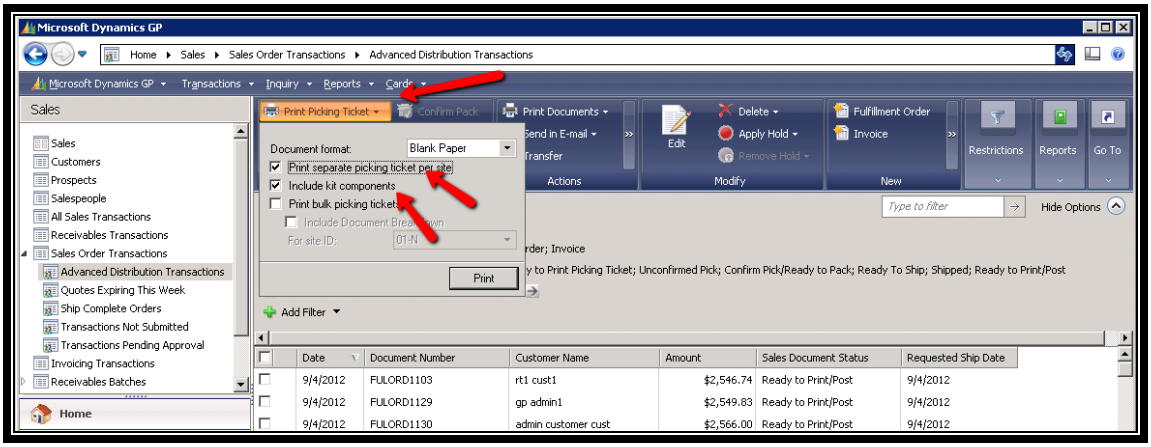

Fig: Print Separate Picking Ticket per Site

- Once you Click **Print** , you will get a **Report Destination** window
- Check mark the **Screen** or **Printer** depending on your requirement

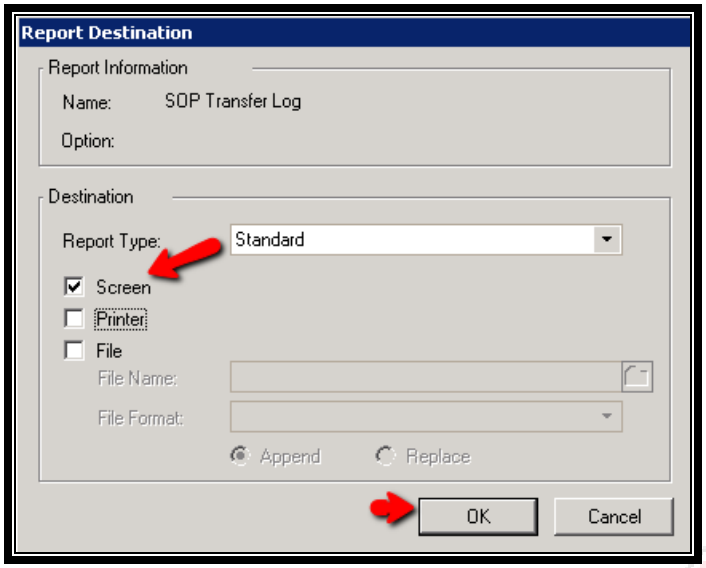

Fig: Printing Reports

- Click **Ok**
- Click on **Refresh**
- Order Status gets changed to **Unconfirmed Pick**
- In order to check the **Unconfirmed Pick** Status at Magento Admin, follow the navigation
- Open **Magento Admin**
- Login to Admin Panel

- Select **Sales → Order**
- Select the required Order & Open
- It will show the following screen which provides the Order Status as **Unconfirmed Pick**

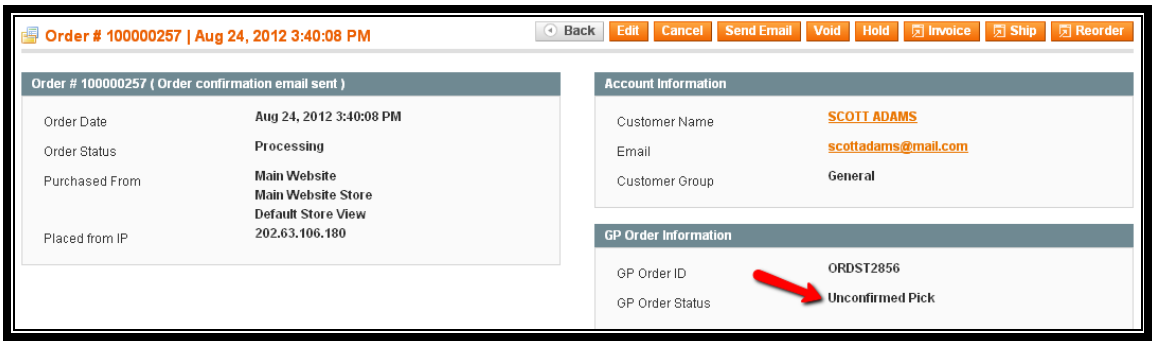

Fig: Order Status (Unconfirmed Pick) in Magento

Order Status →Confirm Pick/Ready to Pack:

- Select the same Order and Click on **Confirm Pick** as shown in the following figure

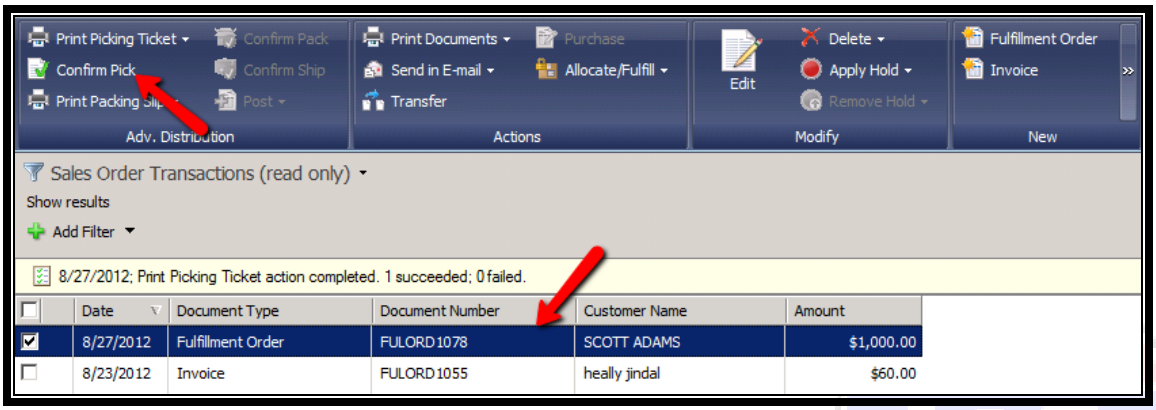

Fig: Confirm Pick

- Once you Click **Confirm Pick** , you will get a **Report Destination** window
- Check mark the **Screen**
- Click **Ok**

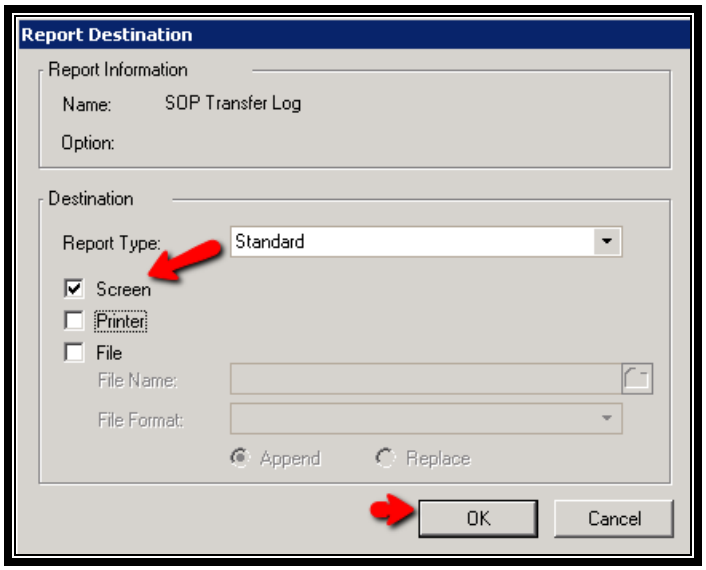

Fig: Printing Reports

- Click on **Refresh**
- The Order Status gets changed to **Confirm Pack/Ready to Pack**
- In order to check the **Confirm Pack/Ready to Pack** Status at Magento Admin, follow the navigation
- Open **Magento Admin**
- Login to Admin Panel
- Select **Sales → Order**
- Select the required Order & Open
- It will show the following screen which provides the Order Status as **Confirm Pick/Ready to Pack**

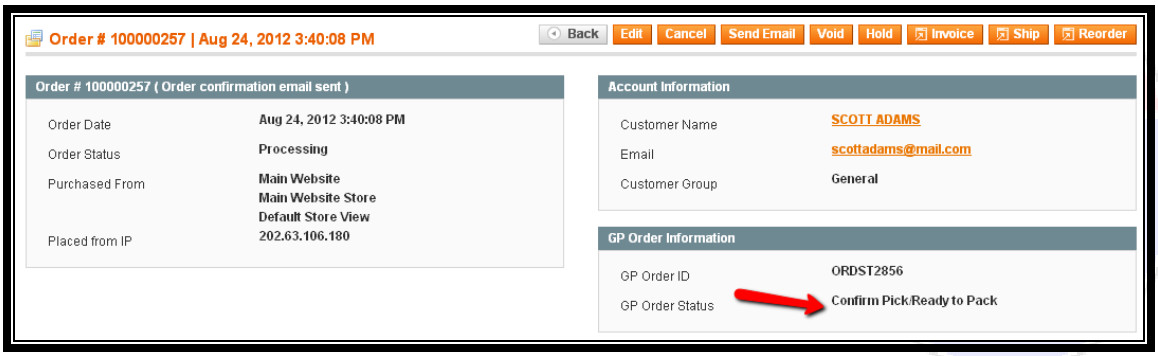

Fig: Order Status (Confirm Pick/Ready to Pack) in Magento

Order Status →Ready to Ship:

- Select the same Order
- Click on **Print Packing Slip** as shown in the following figure

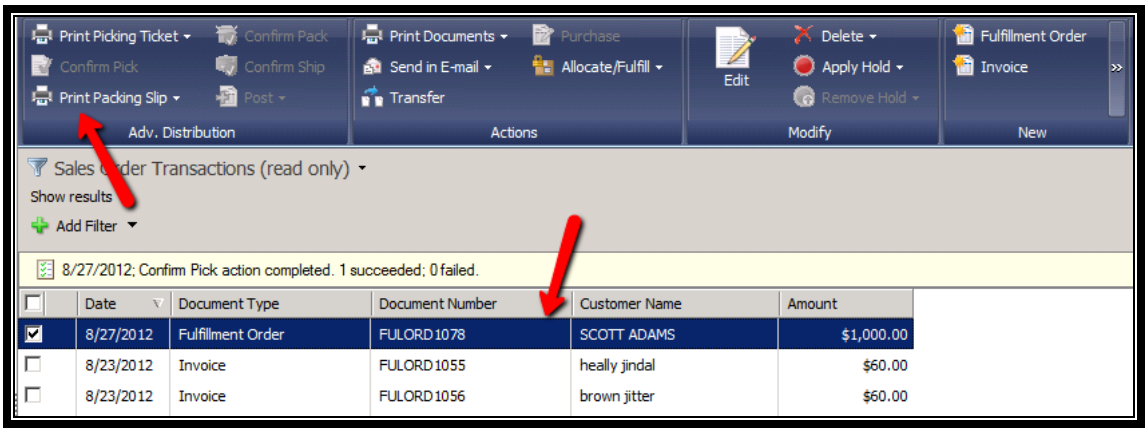

Fig: Print Packing Slip

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- Once you click **Print Packing Slip**, You will see the popup window as shown in the following screen

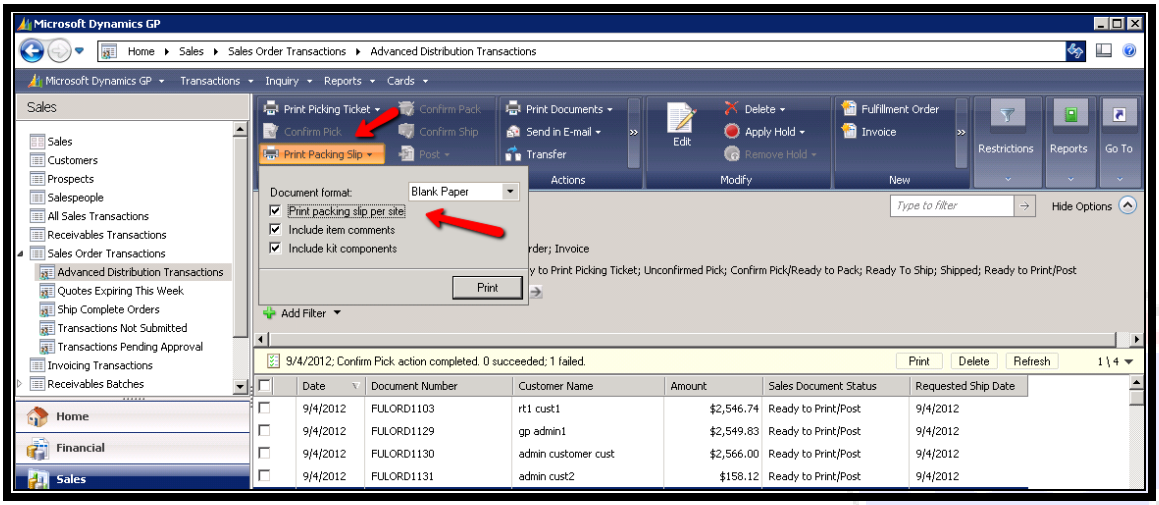


Fig: Print Packing Slip per site

- Check mark the **Print Packing Slip Per Site**

- Click **Print**
- Once you Click **Print** , you will get a **Report Destination** window
- Check mark the **Screen** or **Printer** depending on your requirement

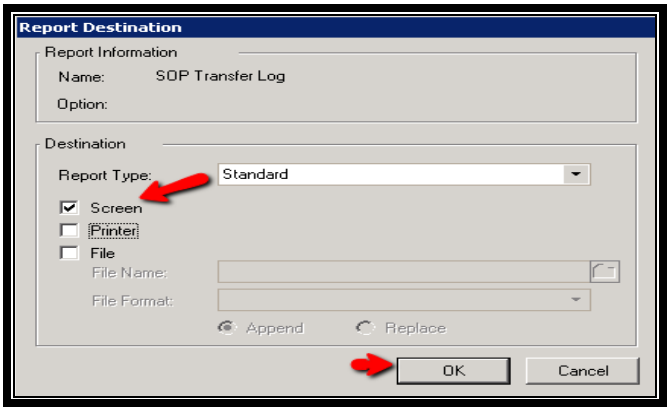


Fig: Printing Reports

- Click **Ok**
- Click on **Refresh**
- Order status gets changed to **Ready to Ship**
- In order to check the **Ready to Ship** Status at Magento Admin, follow the navigation
- Open **Magento Admin**
- Login to Admin Panel
- Select **Sales → Order**
- Select the required Order & Open
- It will show the following screen which provides the Order Status as **Ready to Ship**

Fig: Order Status (Ready to Ship) in Magento

Order Status →Shipped:

- Select the same Order
- Click **Confirm Pack** as shown in the following figure

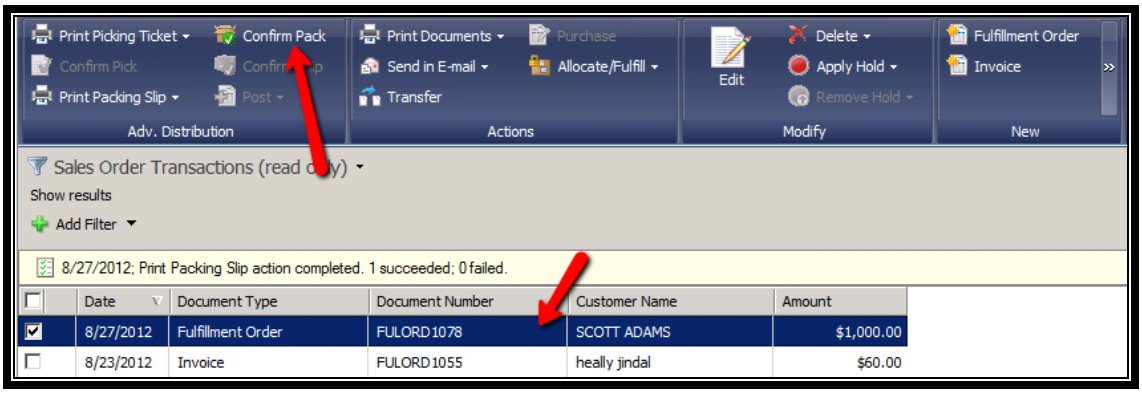


Fig: Confirm Pack

- Once you Click **Confirm Pack** , you will get a **Report Destination** window
- Check mark the **Screen** or **Printer** depending on your requirement

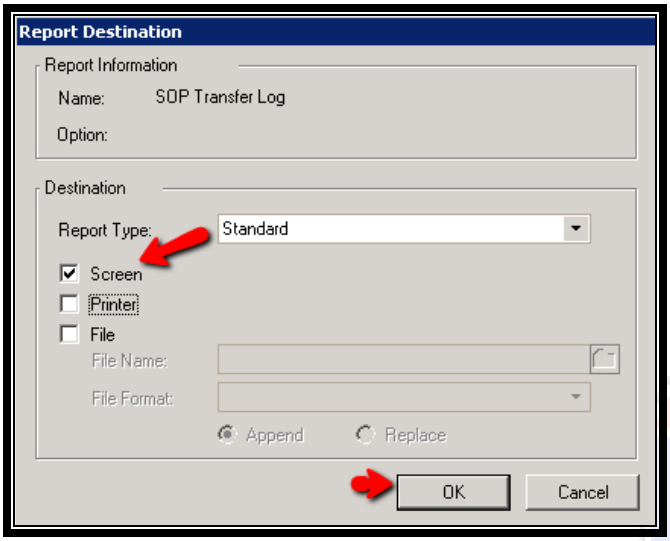


Fig: Printing Reports

- Click **Ok**
- Click on **Refresh**

- Order status gets changes **to Shipped**
- In order to check the **Shipped** Status at Magento Admin, follow the navigation
- Open **Magento Admin**
- Login to Admin Panel
- Select **Sales → Order**
- Select the required Order & Open
- It will show the following screen which provides the Order Status as **Shipped**

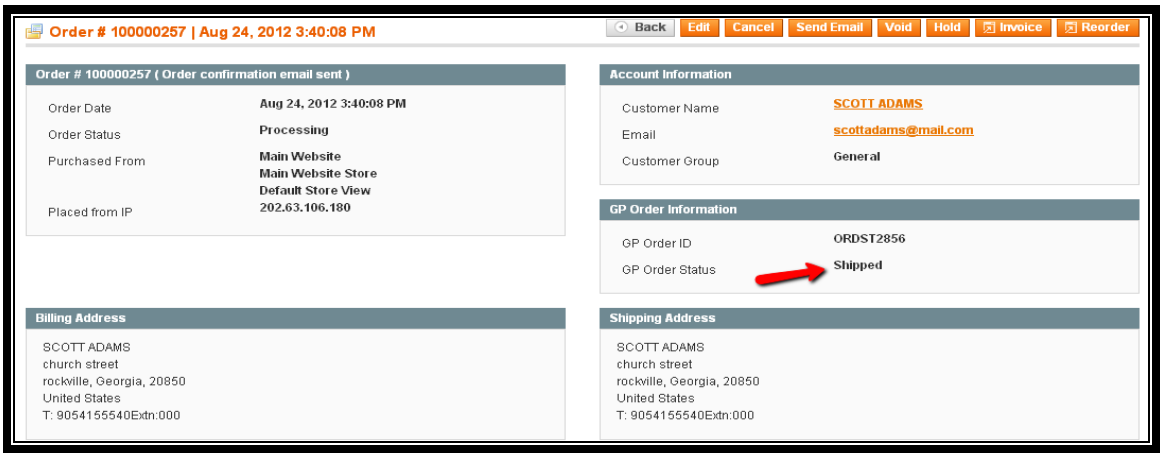


Fig: Order Status (Shipped) in Magento

Note: If you would like to **provide Shipping Tracking Number**, you have to give it before **Confirm Ship** phase

- To enter **Shipping Tracking Number** double click on the **Fulfillment** order
- Click on **User Defined** button which pops up **Sales User-Defined Fields Entry**

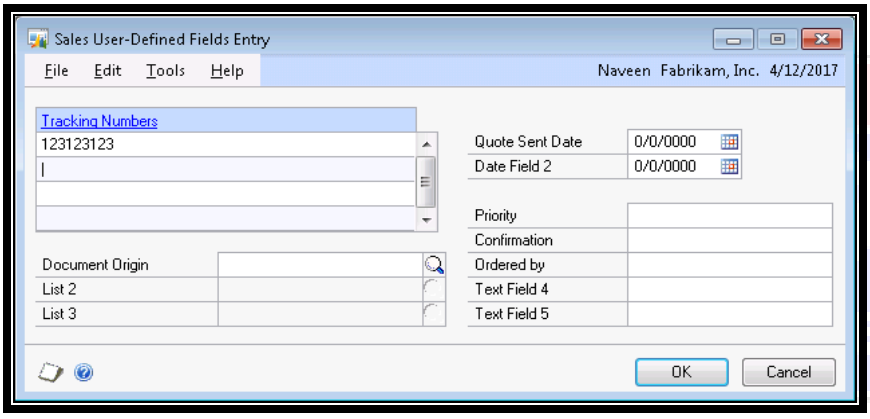


Fig: Entering Tracking Number for a Shipment

- Enter the S**hipping Tracking Number** as shown in the above figure
- Click **Ok**

Order Status →Ready to Print/Post:

- Select the same Order and click on **Confirm Ship** as shown in the following figure

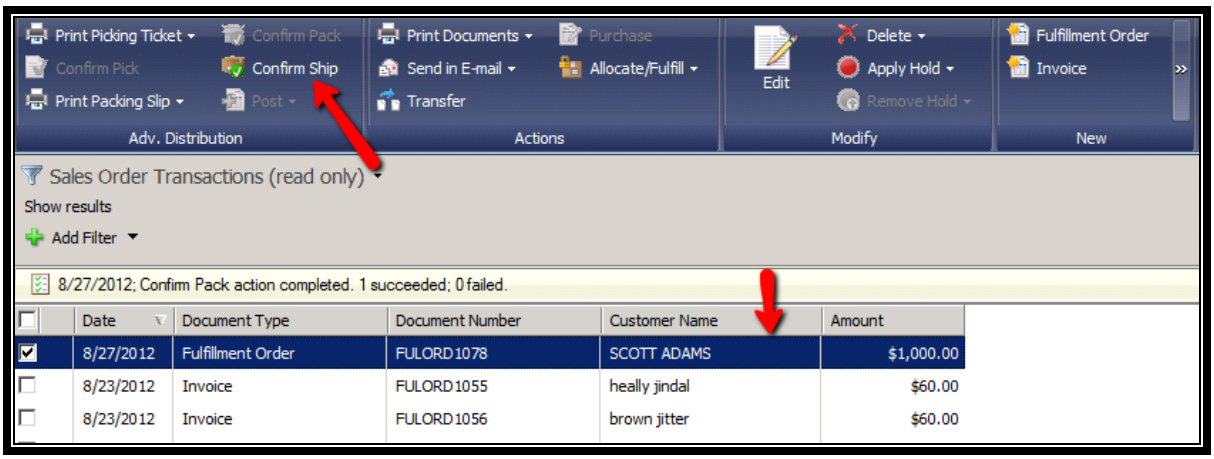


Fig: Confirm Ship

- Once you Click **Confirm Ship** , you will get a **Report Destination** window
- Check mark the **Screen** or **Printer** depending on your requirement

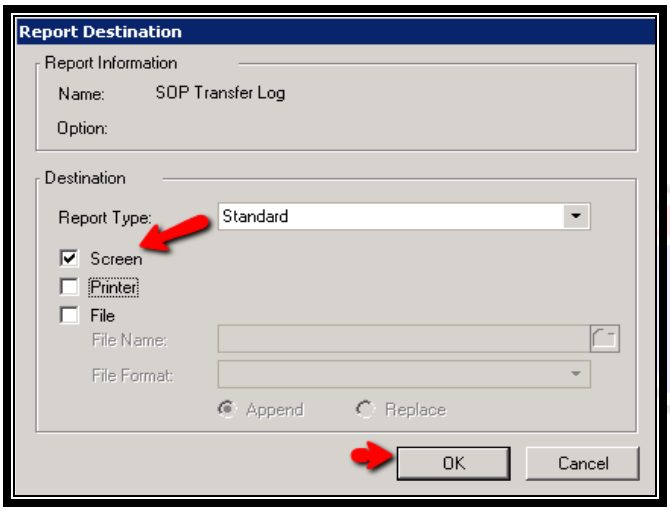


Fig: Printing Reports

- Click **Ok**
- Click on **Refresh**
- The Order Status changes to **Ready to Print/Post**
- Open the **Fulfillment Order** & you will see that the **Type ID** changes from **Fulfillment Order** to **Invoice** as shown in the following figure

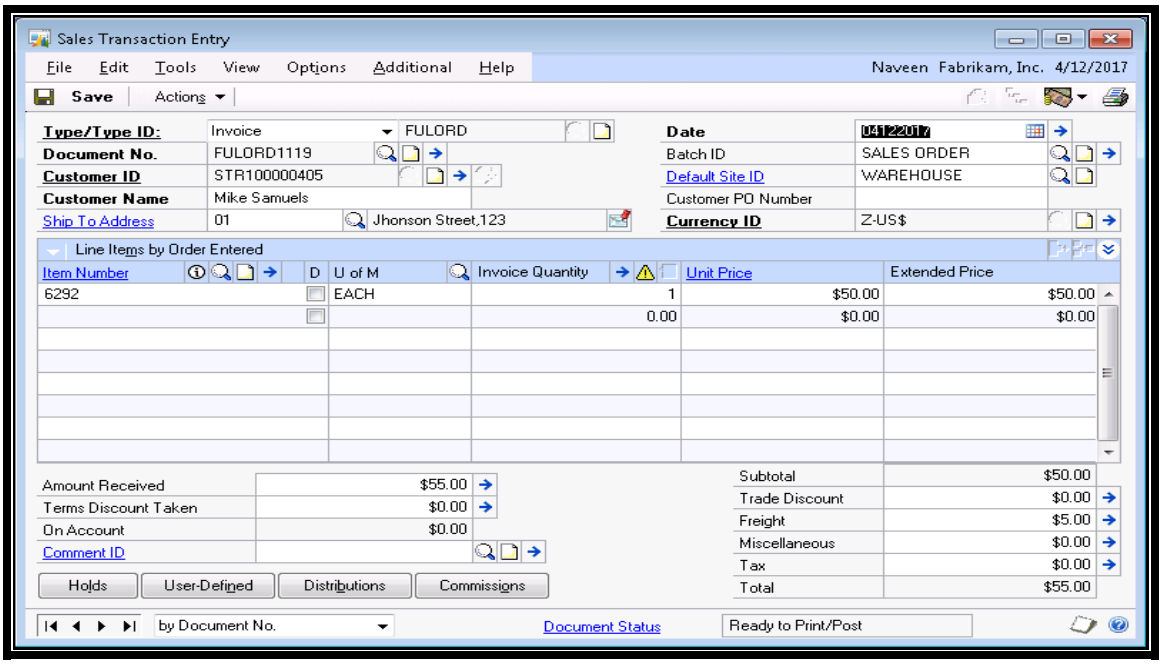


Fig: Changing the Order Status to Invoice (i.e. Completed)

- Once the Order gets synced to Magento at this stage, you can **Post** to General Ledger at any time
- In order to check the **Shipment Confirmation** Status at Magento Admin, follow the navigation
- Open **Magento Admin**
- Login to Admin Panel
- Select **Sales → Order**
- Select the required Order & Open
- It will show the following screen which provides the Order Status as **Completed**

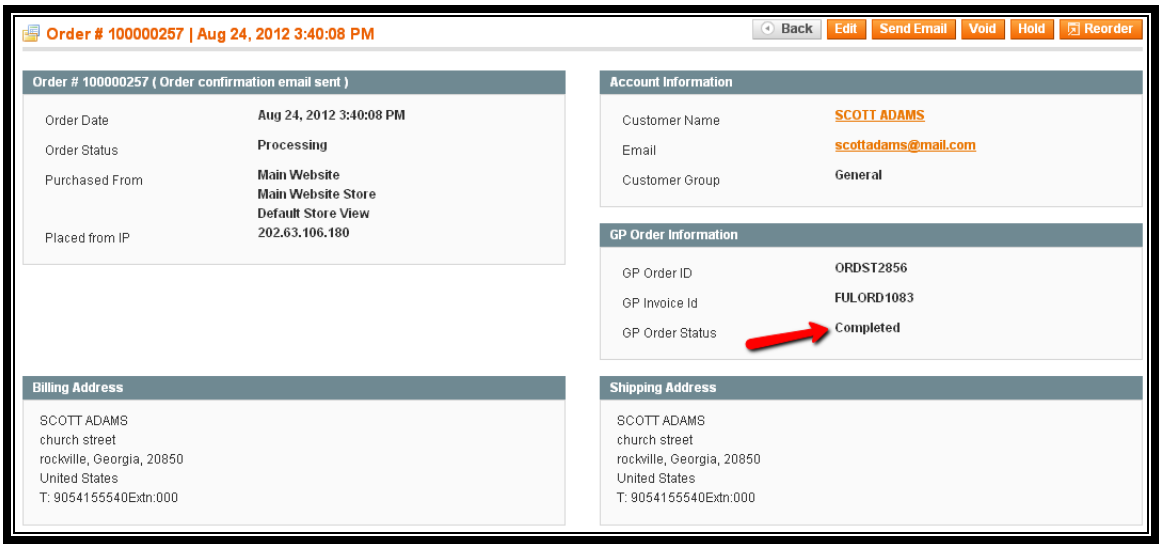


Fig: Order Status (Completed) in Magento

GP Connectivity Signal Display Implementation
[Release II]

Menu Navigation:

- Open **Magento Admin Panel**
- You will see the following Blinking Signal in the header as shown in the following figure

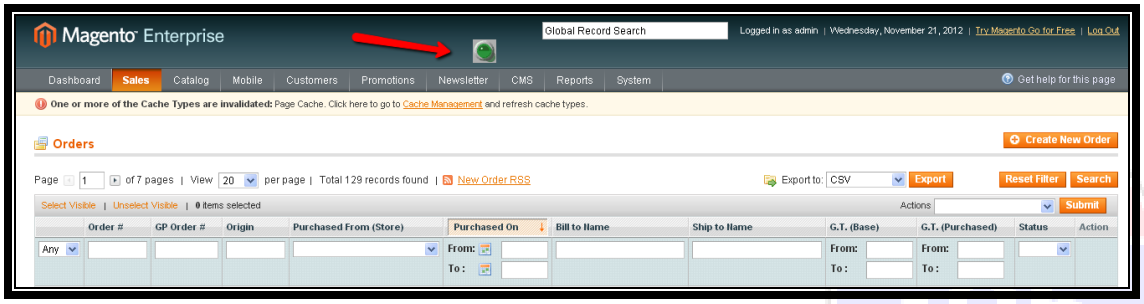


Fig: GP Connectivity Blinking Signal = Green

- If you see the **Signal Color** = **Green**, then it implies that the Magento to GP Connect is successfully working and the both entities are synchronized in nature

- If you click the Green Blinking Icon, you will see a window which provides you with the last 5 failed & 5 successful Orders as shown in the following figure

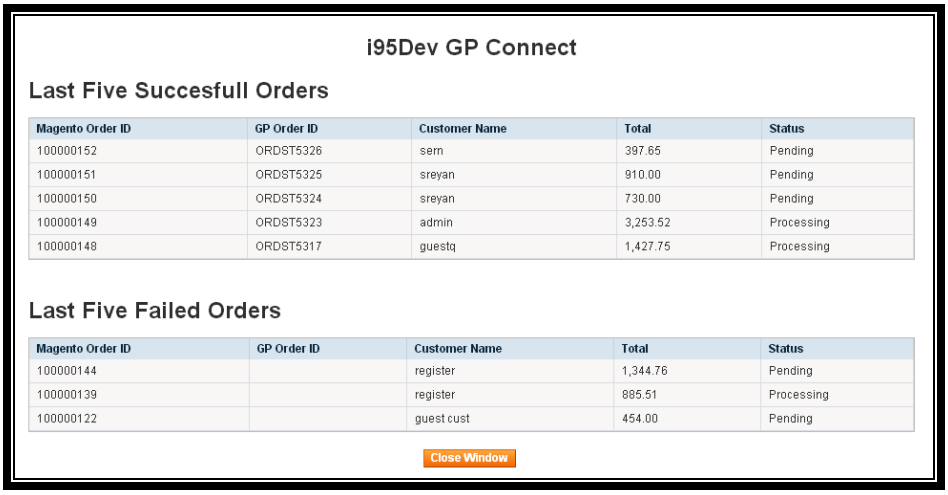

i95Dev GP Connect
Last Five Succesfull Orders
Magento Order ID | GP Order ID | Customer Name | Total | Status
100000152 | ORDST5326 | sern | 397.65 | Pending
100000151 | ORDST5325 | sreyan | 910.00 | Pending
100000150 | ORDST5324 | sreyan | 730.00 | Pending
100000149 | ORDST5323 | admin | 3,253.52 | Processing
100000148 | ORDST5317 | guestq | 1,427.75 | Processing
Last Five Failed Orders
Magento Order ID | GP Order ID | Customer Name | Total | Status
100000144 | | register | 1,344.76 | Pending
100000139 | | register | 885.51 | Processing
100000122 | | guest cust | 454.00 | Pending
Close Window

Fig: Displaying Last 5 Failed & Successful Orders

Note: In order to check the following functionality of the i95Dev GP Connect failure case, kindly make GP offline for a while

- Once the GP goes offline, you see the **Signal Color = Red,** the it implies that the Magento to GP connect is failed as shown in the following figure

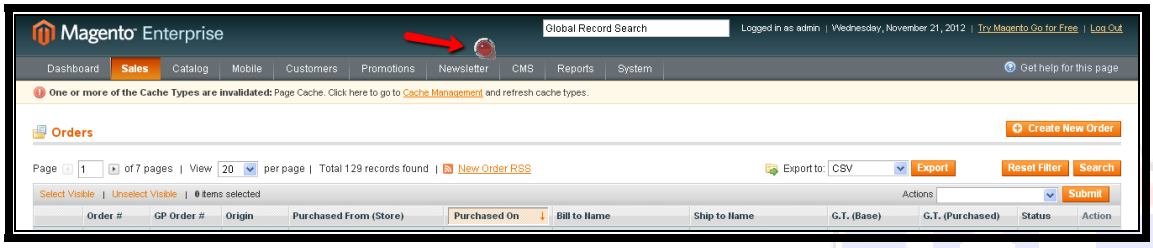

Magento Enterprise
Global Record Search
Logged in as admin | Wednesday, November 21, 2012 | Try Magento Go for Free | Log Out
Dashboard | Sales | Catalog | Mobile | Customers | Promotions | Newsletter | CMS | Reports | System
Get help for this page
One or more of the Cache Types are invalidated: Page Cache. Click here to go to Cache Management and refresh cache types.
Orders
Create New Order
Page 1 of 7 pages | View 20 per page | Total 129 records found | New Order RSS
Export to: CSV Export
Reset Filter Search
Select Visible | Unselect Visible | 0 items selected
Actions Submit
Order # | GP Order # | Origin | Purchased From (Store) | Purchased On | Bill to Name | Ship to Name | G.T. (Base) | G.T. (Purchased) | Status | Action

Fig: GP Connectivity Blinking Signal = Red

- If you click the Red Blinking Icon, you will see a window which provides you with the last 5 failed & 5 successful Orders as shown in the following figure

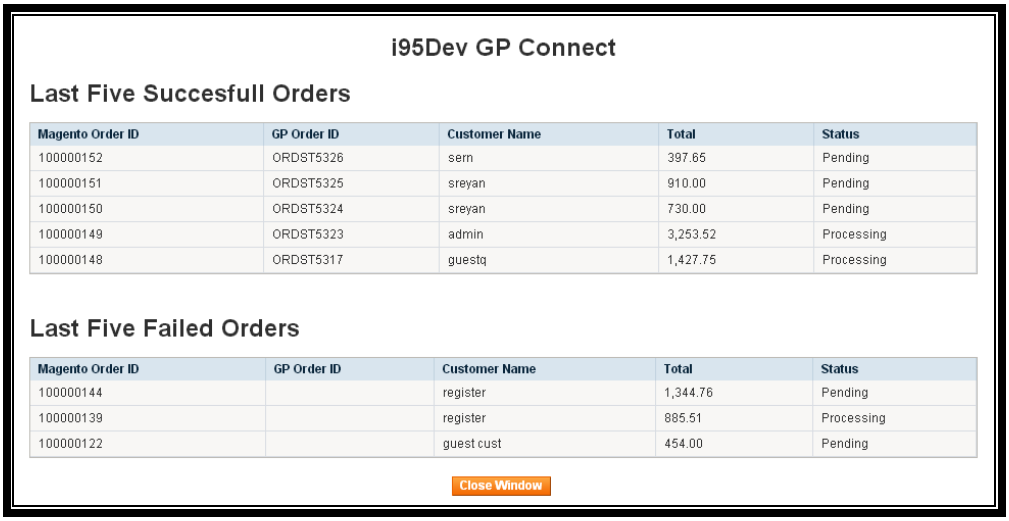

i95Dev GP Connect
Last Five Succesfull Orders
Magento Order ID | GP Order ID | Customer Name | Total | Status
100000152 | ORDST5326 | sern | 397.65 | Pending
100000151 | ORDST5325 | sreyan | 910.00 | Pending
100000150 | ORDST5324 | sreyan | 730.00 | Pending
100000149 | ORDST5323 | admin | 3,253.52 | Processing
100000148 | ORDST5317 | guestq | 1,427.75 | Processing
Last Five Failed Orders
Magento Order ID | GP Order ID | Customer Name | Total | Status
100000144 | | register | 1,344.76 | Pending
100000139 | | register | 885.51 | Processing
100000122 | | guest cust | 454.00 | Pending
Close Window

Fig: Displaying Last 5 Failed & Successful Orders

Failed Transaction [Customers/Product/Orders] Sync Report from Magento to GP [Release II]

Menu Navigation:

Note: In order to check the following functionality of the Failed Transaction Sync Report, kindly make GP offline for a while

- Open **Magento Admin Panel**
- Select **Reports → i95Dev Error Reports**
- Select **Magento to GP Reports** as shown in the following figure

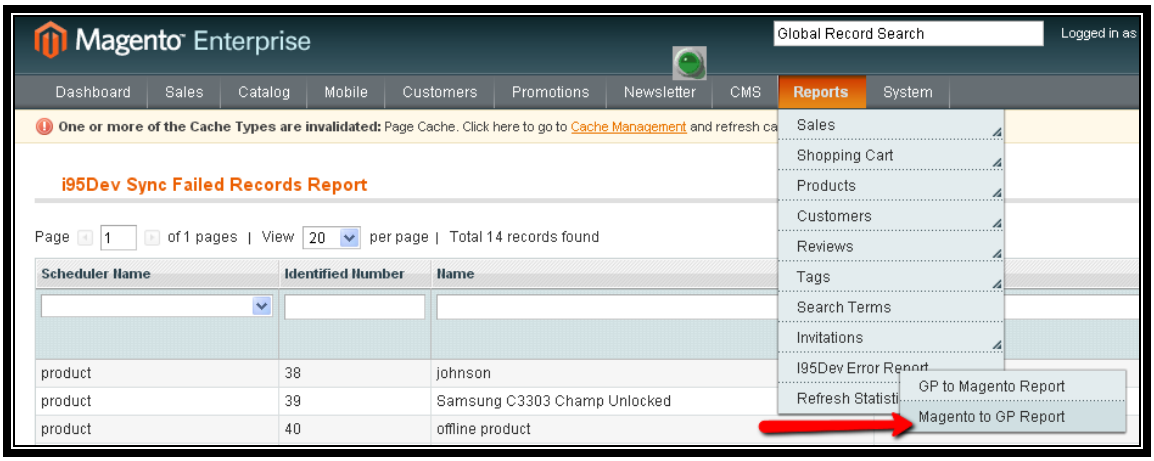


Fig: Selecting Magento to GP Report

- You will see the following screen where in you will find all the failed **Customers, Orders, Products** from Magento to GP

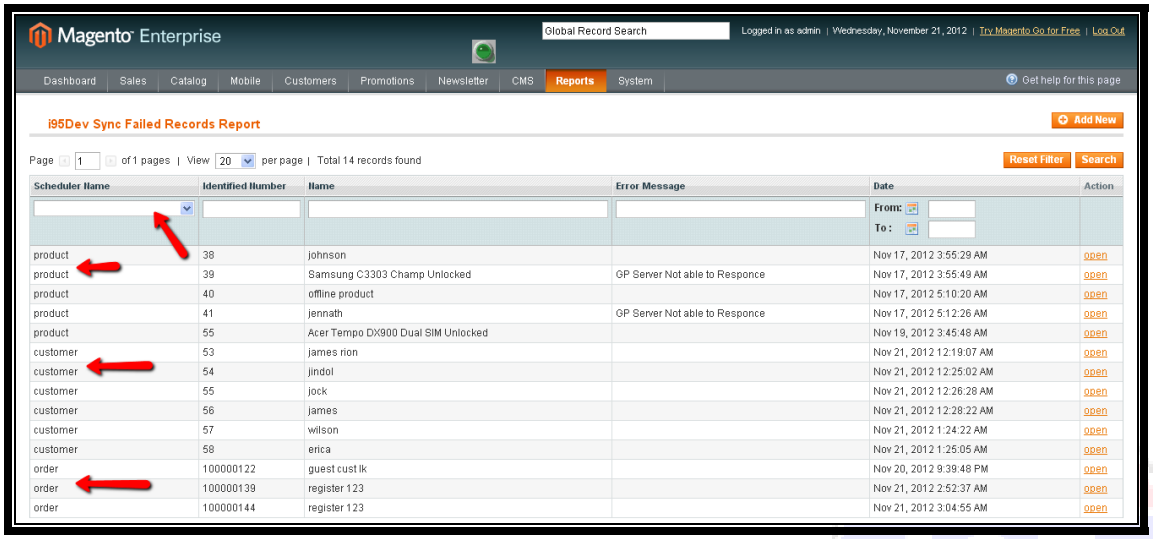

Magento Enterprise
Global Record Search
Logged in as admin | Wednesday, November 21, 2012 | Try Magento Go for Free | Log Out
Dashboard
Sales
Catalog
Mobile
Customers
Promotions
Newsletter
CMS
Reports
System
Get help for this page
i95Dev Sync Failed Records Report
Add New
Page 1 of 1 pages | View 20 per page | Total 14 records found
Reset Filter
Search
Scheduler Name
Identified Number
Name
Error Message
Date
From:
To :
Action
product 38 johnson Nov 17, 2012 3:55:29 AM open
product 39 Samsung C3303 Champ Unlocked GP Server Not able to Responce Nov 17, 2012 3:55:49 AM open
product 40 offline product Nov 17, 2012 5:10:20 AM open
product 41 jennath GP Server Not able to Responce Nov 17, 2012 5:12:26 AM open
product 55 Acer Tempo DX900 Dual SIM Unlocked Nov 19, 2012 3:45:48 AM open
customer 53 james rion Nov 21, 2012 12:19:07 AM open
customer 54 jindol Nov 21, 2012 12:25:02 AM open
customer 55 jock Nov 21, 2012 12:26:28 AM open
customer 56 james Nov 21, 2012 12:28:22 AM open
customer 57 wilson Nov 21, 2012 1:24:22 AM open
customer 58 erica Nov 21, 2012 1:25:05 AM open
order 100000122 guest cust lk Nov 20, 2012 9:39:48 PM open
order 100000139 register 123 Nov 21, 2012 2:52:37 AM open
order 100000144 register 123 Nov 21, 2012 3:04:55 AM open

Fig: Report of Failed Customer/Products/Orders

- Select **Scheduler Name = Customers** from the drop down list
- Click **Search**
- You will see report of all the failed Customers as shown in the following figure

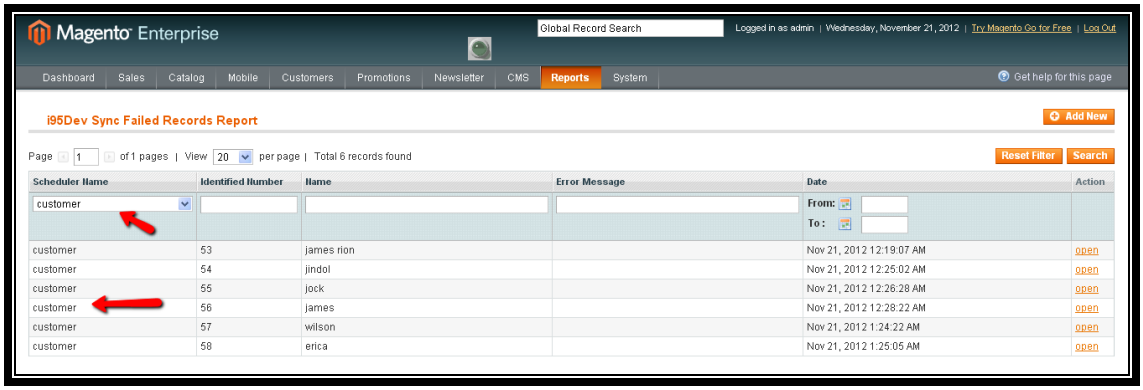

Magento Enterprise
Global Record Search
Logged in as admin | Wednesday, November 21, 2012 | Try Magento Go for Free | Log Out
Dashboard Sales Catalog Mobile Customers Promotions Newsletter CMS Reports System
Get help for this page
i95Dev Sync Failed Records Report
Add New
Page 1 of 1 pages | View 20 per page | Total 6 records found
Reset Filter Search
Scheduler Name Identified Number Name Error Message Date Action
customer
From:
To:
customer 53 james rion Nov 21, 2012 12:19:07 AM open
customer 54 jindol Nov 21, 2012 12:25:02 AM open
customer 55 jock Nov 21, 2012 12:26:28 AM open
customer 56 james Nov 21, 2012 12:28:22 AM open
customer 57 wilson Nov 21, 2012 1:24:22 AM open
customer 58 erica Nov 21, 2012 1:25:05 AM open

Fig: Report of Failed Customer

- Select **Scheduler Name = Products** from the drop down list
- Click **Search**
- You will see report of all the failed Products as shown in the following figure

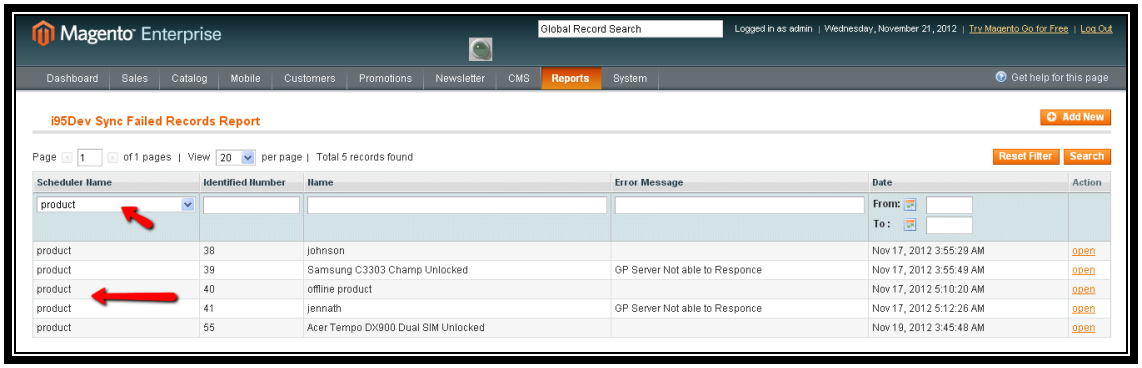

Magento Enterprise
Global Record Search
Logged in as admin | Wednesday, November 21, 2012 | Try Magento Go for Free | Log Out
Dashboard Sales Catalog Mobile Customers Promotions Newsletter CMS Reports System
Get help for this page
i95Dev Sync Failed Records Report
Add New
Page 1 of 1 pages | View 20 per page | Total 5 records found
Reset Filter Search
Scheduler Name Identified Number Name Error Message Date Action
product
From:
To:
product 38 johnson Nov 17, 2012 3:55:29 AM open
product 39 Samsung C3303 Champ Unlocked GP Server Not able to Responce Nov 17, 2012 3:55:49 AM open
product 40 offline product Nov 17, 2012 5:10:20 AM open
product 41 jennath GP Server Not able to Responce Nov 17, 2012 5:12:26 AM open
product 55 Acer Tempo DX900 Dual SIM Unlocked Nov 19, 2012 3:45:48 AM open

Fig: Report of Failed Products

- Select **Scheduler Name = Order** from the drop down list
- Click **Search**
- You will see report of all the failed Order as shown in the following figure

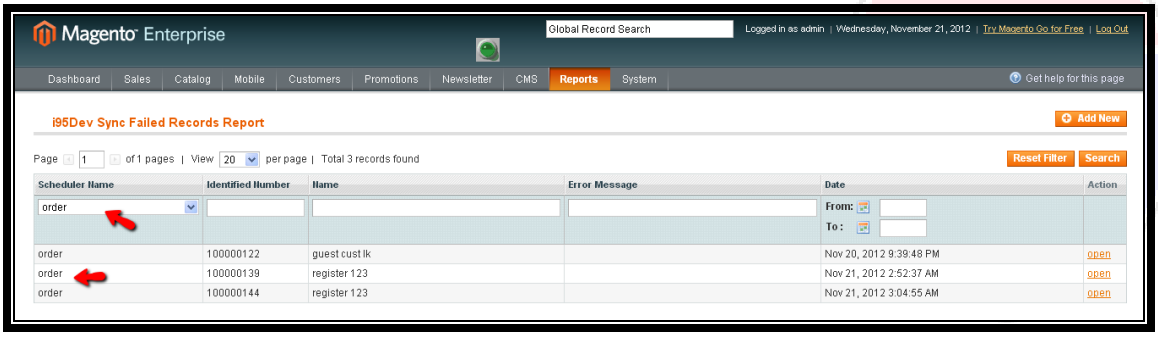

Magento Enterprise
Global Record Search
Logged in as admin | Wednesday, November 21, 2012 | Try Magento Go for Free | Log Out
Dashboard Sales Catalog Mobile Customers Promotions Newsletter CMS Reports System
Get help for this page
i95Dev Sync Failed Records Report
Add New
Page 1 of 1 pages | View 20 per page | Total 3 records found
Reset Filter Search
Scheduler Name Identified Number Name Error Message Date Action
order
From:
To:
order 100000122 guest cust lk Nov 20, 2012 9:39:48 PM open
order 100000139 register 123 Nov 21, 2012 2:52:37 AM open
order 100000144 register 123 Nov 21, 2012 3:04:55 AM open

Fig: Report of Failed Orders

Failed Transaction [Customers/Product/Orders] Sync Report from GP to Magento [Release II]

Menu Navigation:

Note: In order to check the following functionality of the Failed Transaction Sync Report, kindly make GP offline for a while

- Open **Magento Admin Panel**
- Select **Reports → i95Dev Error Reports**
- Select **GP to Magento Reports** as shown in the following figure

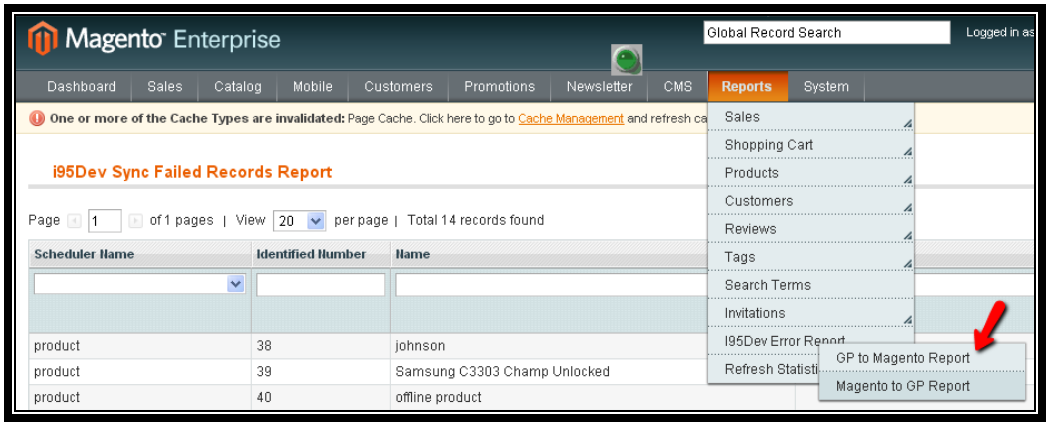


Fig: Selecting GP to Magento Report

- You will see the following screen where in you will find all the failed **Customers, Orders, Products** from GP to Magento

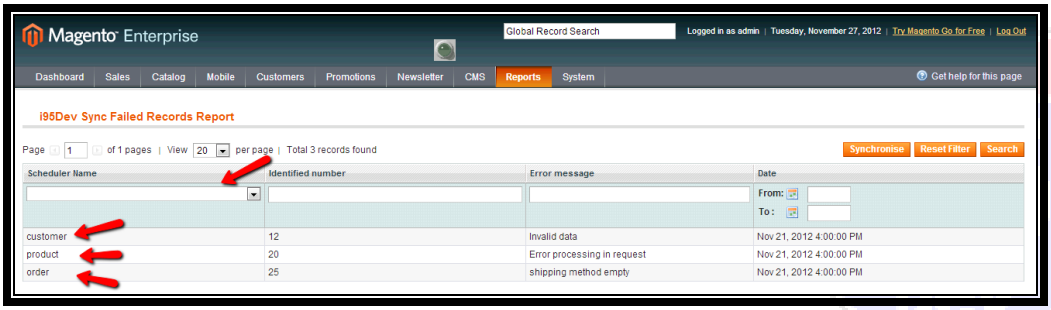


Fig: Report of Failed Customer/Products/Orders

- Select **Scheduler Name = Customers** from the drop down list
- Click **Search**
- You will see report of all the failed Customers as shown in the following figure

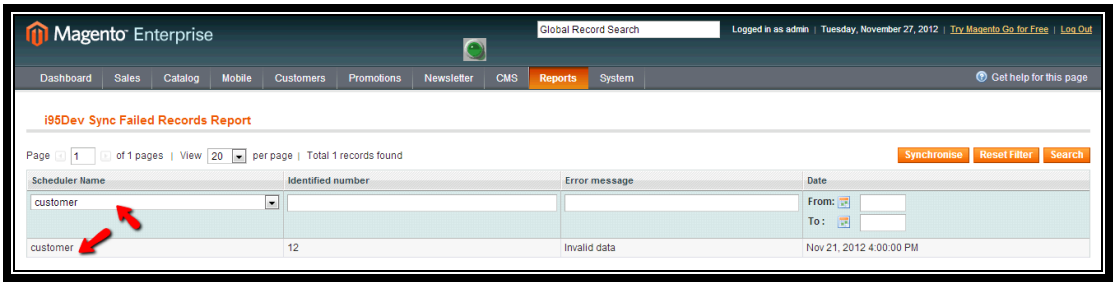


Fig: Report of Failed Customer

- Select **Scheduler Name = Products** from the drop down list
- Click **Search**
- You will see report of all the failed Products as shown in the following figure

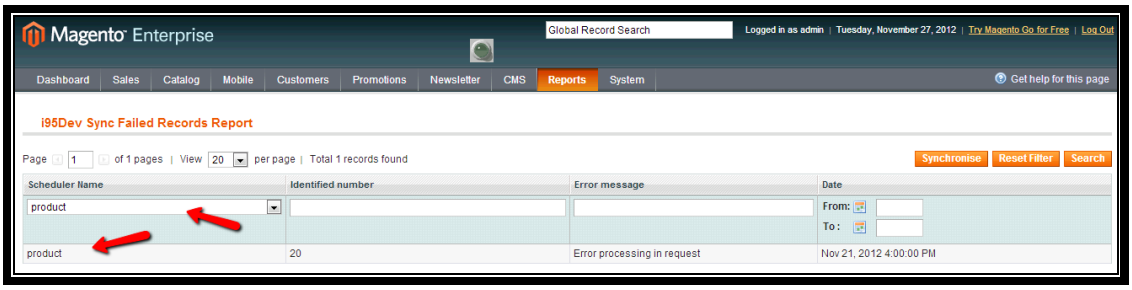


Fig: Report of Failed Products

- Select **Scheduler Name = Order** from the drop down list
- Click **Search**
- You will see report of all the failed Order as shown in the following figure

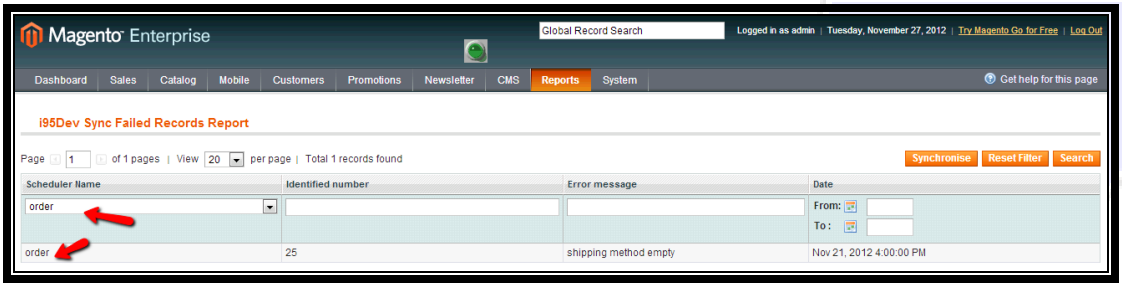


Fig: Report of Failed Orders

- You will see **Synchronization** button as shown in the following figure

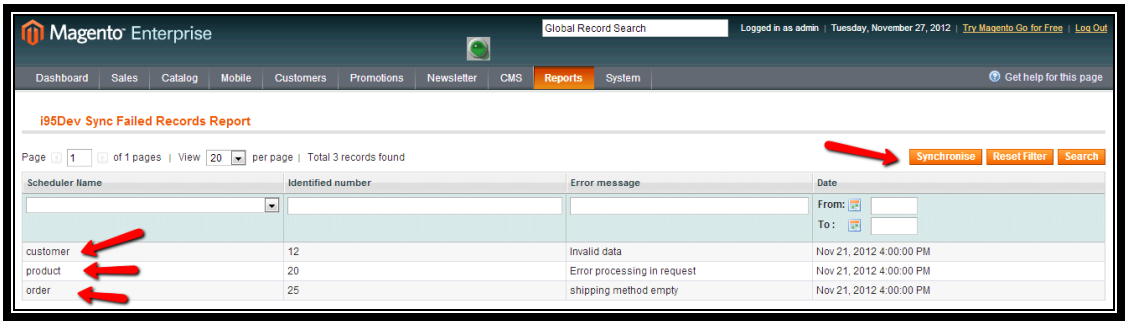


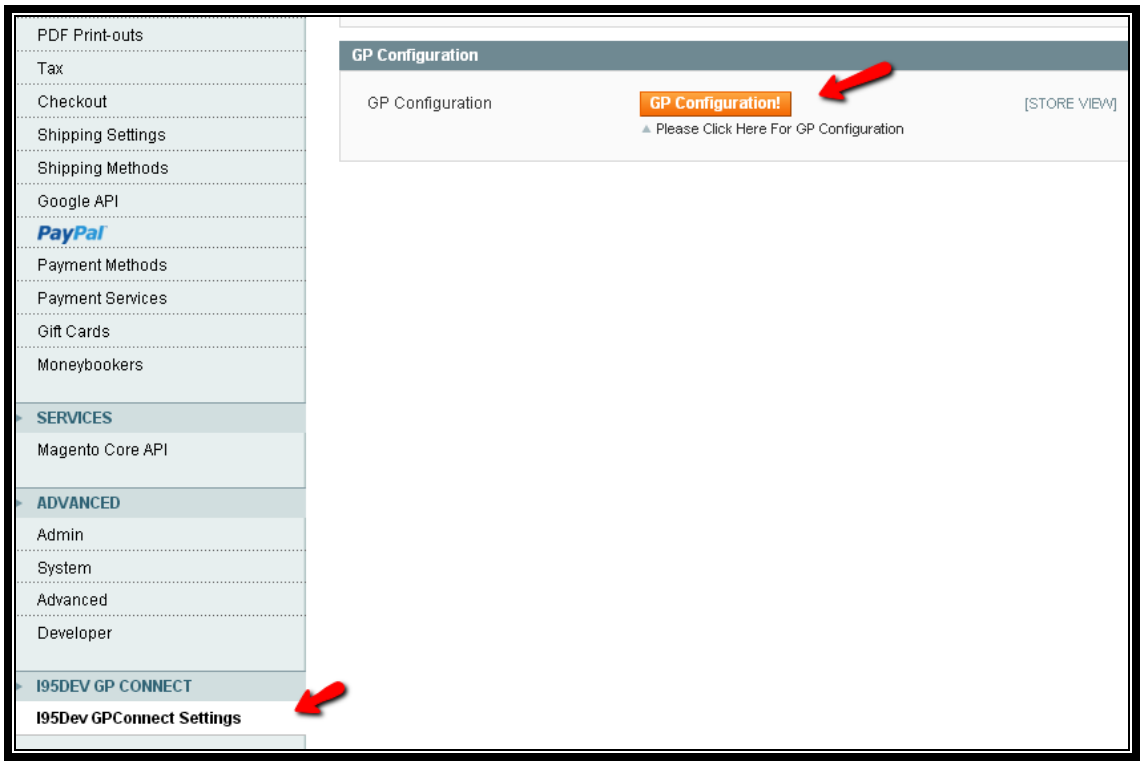
Fig: Synchronization of Customers/Orders/Products

- Once you Click **Synchronization** button, the failed records i.e. Customers/Orders/Products will get synced to Dynamics GP & further will not appear in GP to Magento Reports upon successful synchronization of the records to Dynamics GP

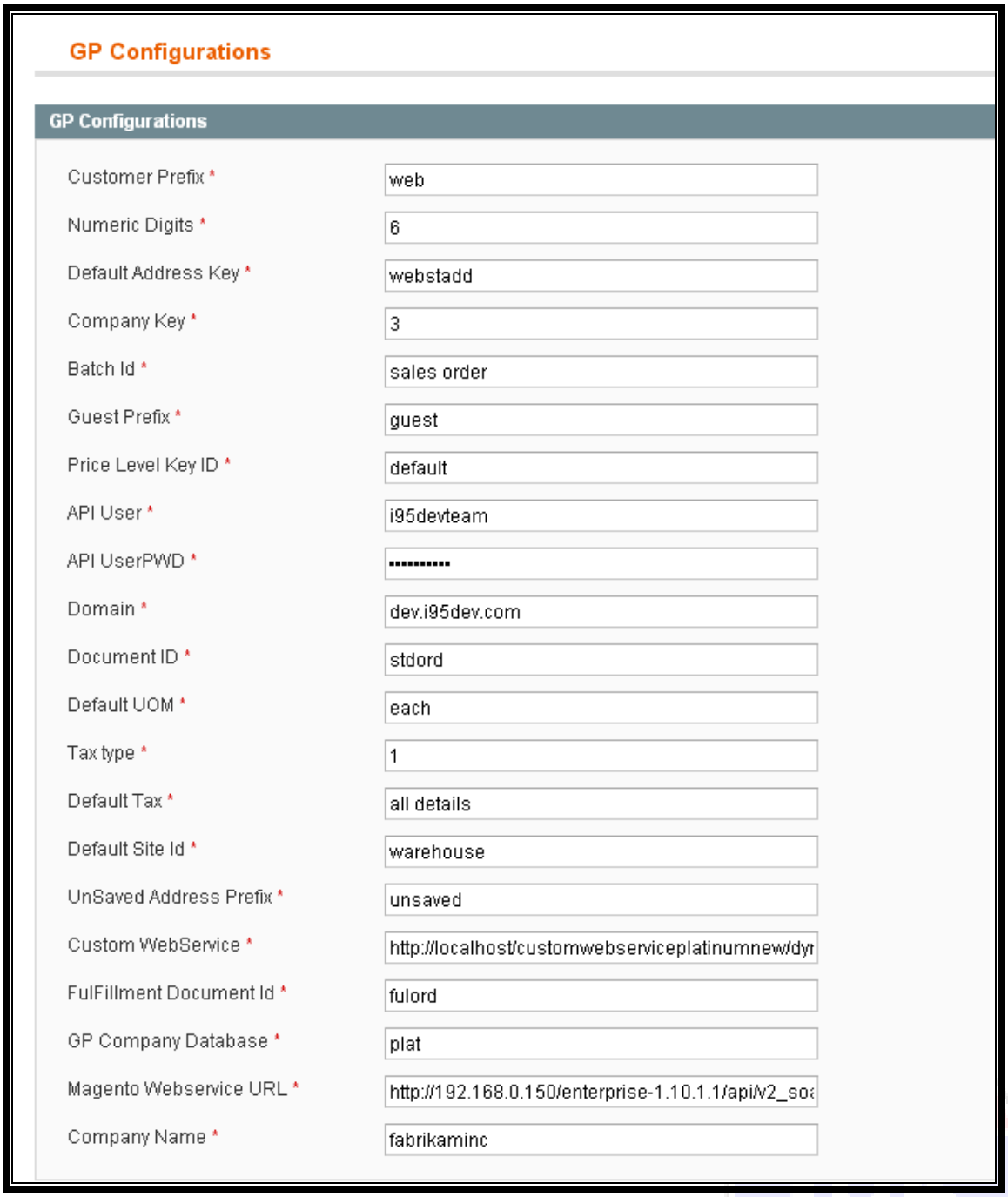
Configuration Implementation from Magento to GP
[Release II]

Menu Navigation:

- Open **Magento Admin Panel**
- Select **System → Configuration**
- Click **i95Dev GP Connect Setting** where in you will see the **GP Configuration** button as shown in the following figure



- Once you click the **GP Configuration** button, you will see the Configuration Fields that you need to provide as shown in the following figure
- Provide required fields of the GP Configurations in Magento & Click **Save**


GP Configurations
GP Configurations
Customer Prefix *
web
Numeric Digits *
6
Default Address Key *
webstadd
Company Key *
3
Batch Id *
sales order
Guest Prefix *
guest
Price Level Key ID *
default
API User *
i95devteam
API UserPWD *
Domain *
dev.i95dev.com
Document ID *
stdord
Default UOM *
each
Tax type *
1
Default Tax *
all details
Default Site Id *
warehouse
UnSaved Address Prefix *
unsaved
Custom WebService *
http://localhost/customwebserviceplatinumnew/dyr
FulFillment Document Id *
fulord
GP Company Database *
plat
Magento Webservice URL *
http://192.168.0.150/enterprise-1.10.1.1/api/v2_soa
Company Name *
fabrikaminc

Locale Implementation with Default English [Release II]

Menu Navigation:

Menu Navigation:

- Open **Magento Admin Panel**
- Select **System → Configuration**
- Click **i95Dev GP Connect Setting** where in you will see the **GP Configuration** button as shown in the following figure

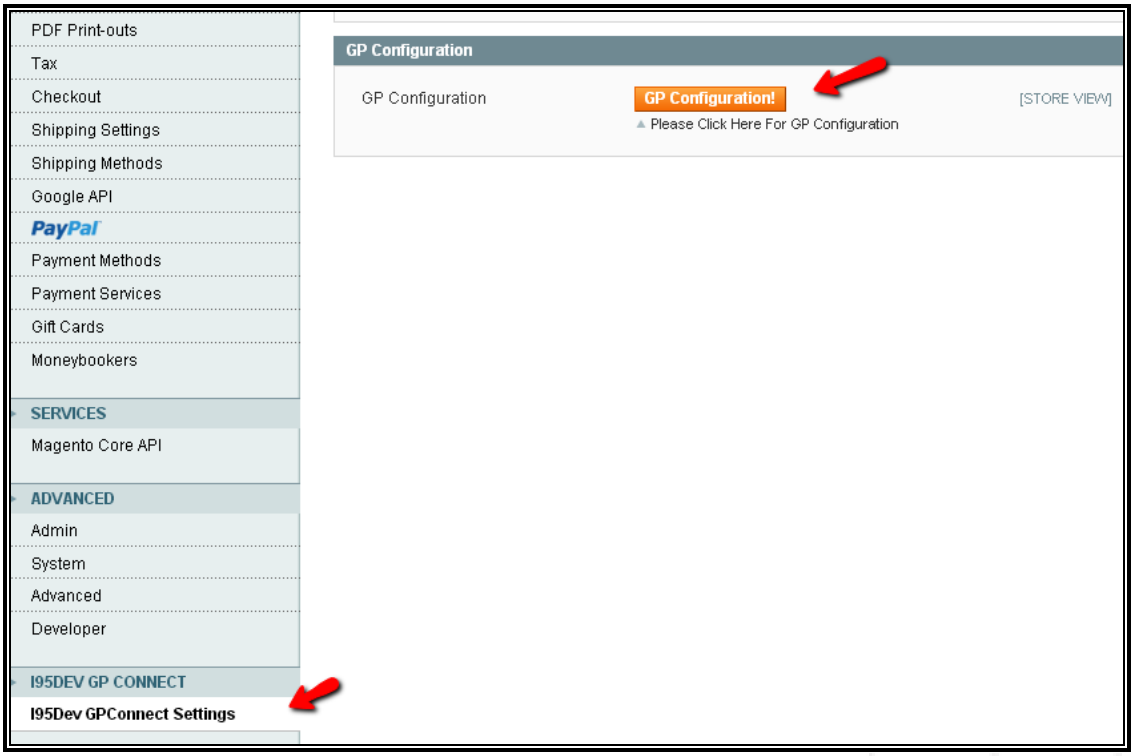


Fig: GP Configuration

- Once you click the **GP Configuration** button, you will see the Configuration Fields that you need to provide as shown in the following figure
- Provide required fields of the GP Configurations in Magento & Click **Save**

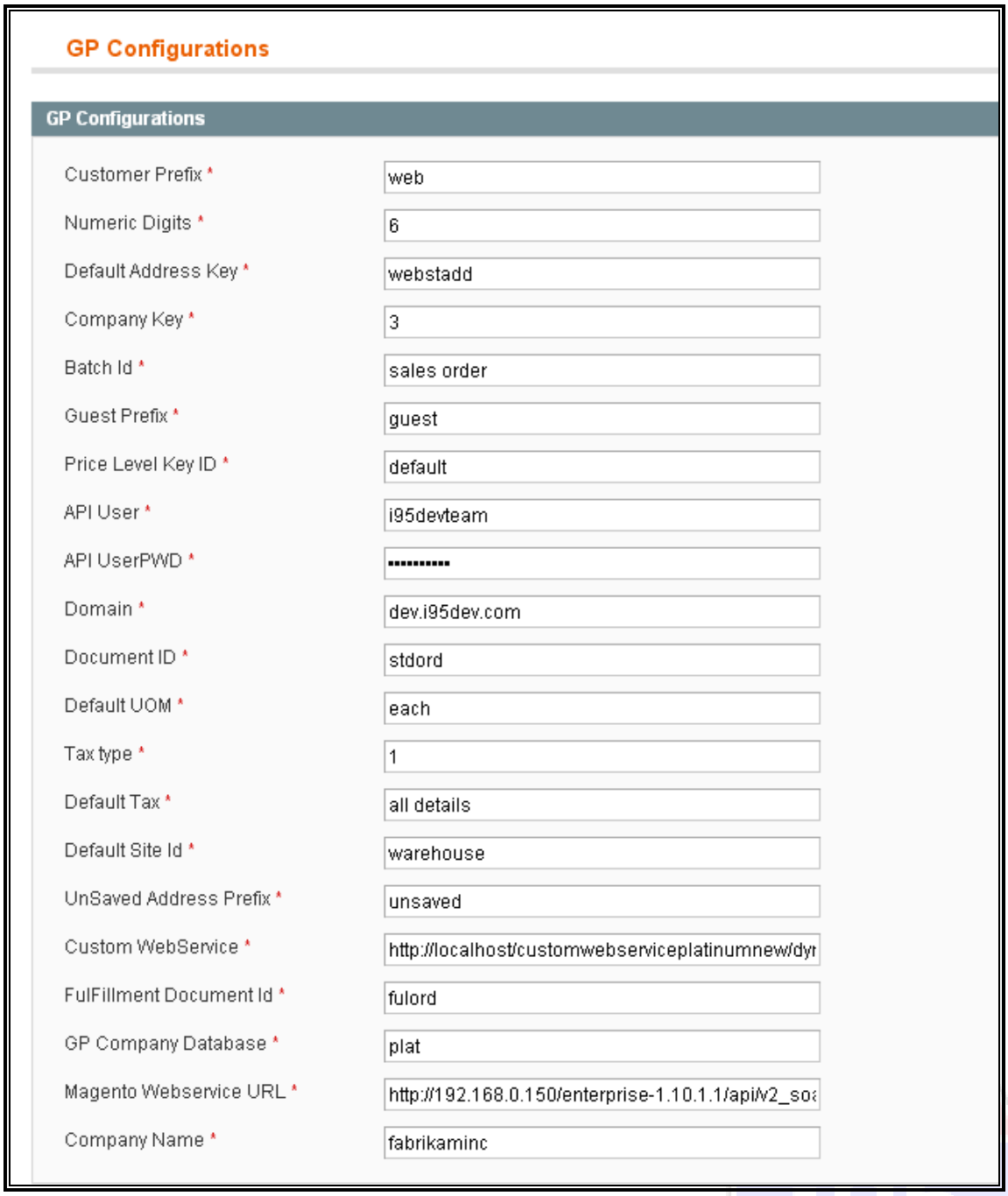


Fig: Providing GP Configurations in Magento

Multi - Currency Implementation [Release II]

Menu Navigation:

Note: Assuming that the Customer is already logged in to the Magento Store

- Open **Magento Store**
- Navigate to **Products Menu → Select Product(S) → Add to Cart** as shown in the following figure

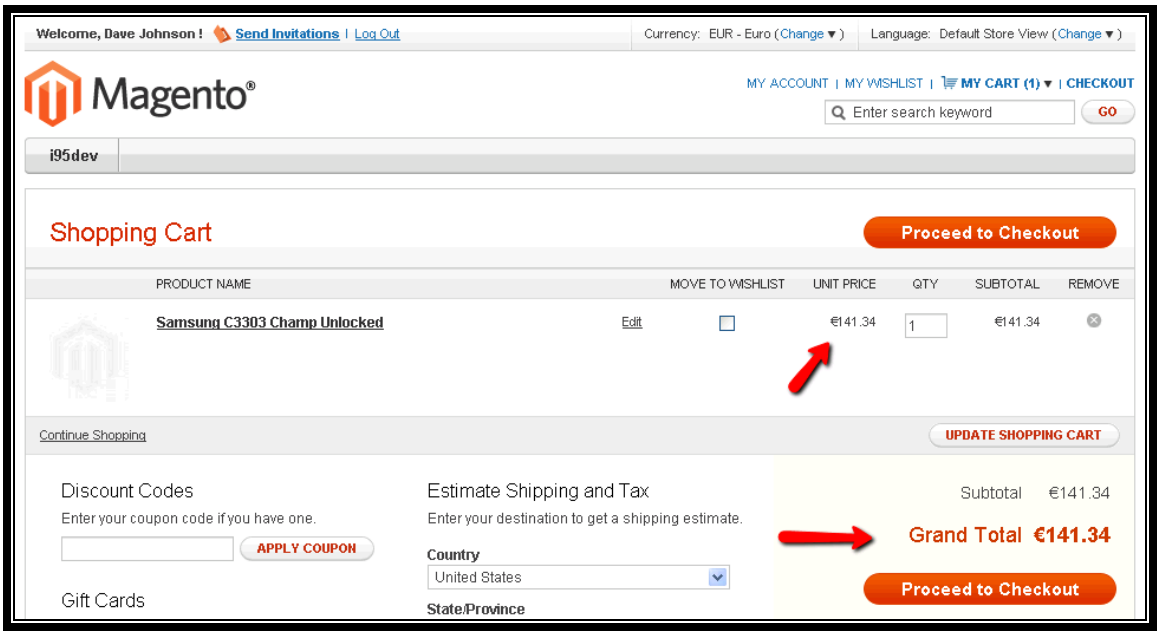


Fig: Adding a Product to the Cart

- You can see the *Product Cost, Subtotal, Grand Total* is mentioned in the **Euro Currency**
- Click on **Proceed to Checkout** button over the next screen
- Login with Customer Credentials created earlier
- (Or) register as a New Customer if you did not register earlier
- Select **Billing & Shipping Addresses** & Provide the required details
- Select one of the **Shipping Methods** and Continue
- Select **Payment Information** and Continue

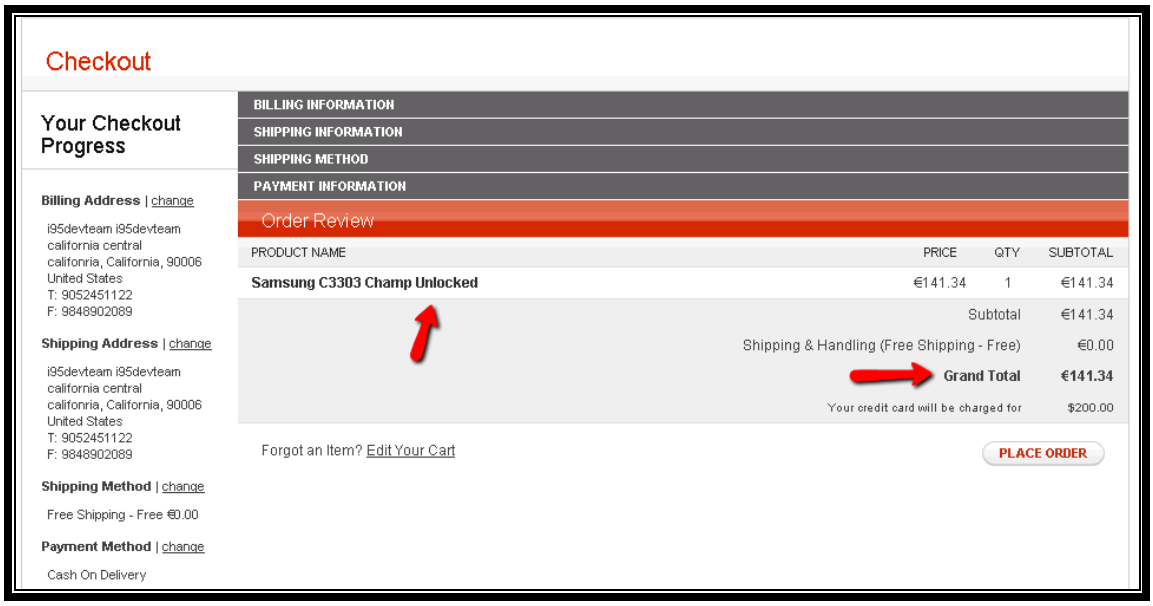


Fig: Checking Out a Product with Euro Currency

- Click on **Place Order**
- In order to check back at Magento Back End, follow the navigation mentioned
- Open **Magento Admin Panel**
- Select **Sales → Order**
- Open the required order that's been placed from Magento Front End
- You will see the following screen with all the details of the Order in the Euro Currency, but the Order was placed in Admin with Base Currency i.e. USD
- You can even find the Euro Currency getting applied for each and individual line item as shown in the following figure

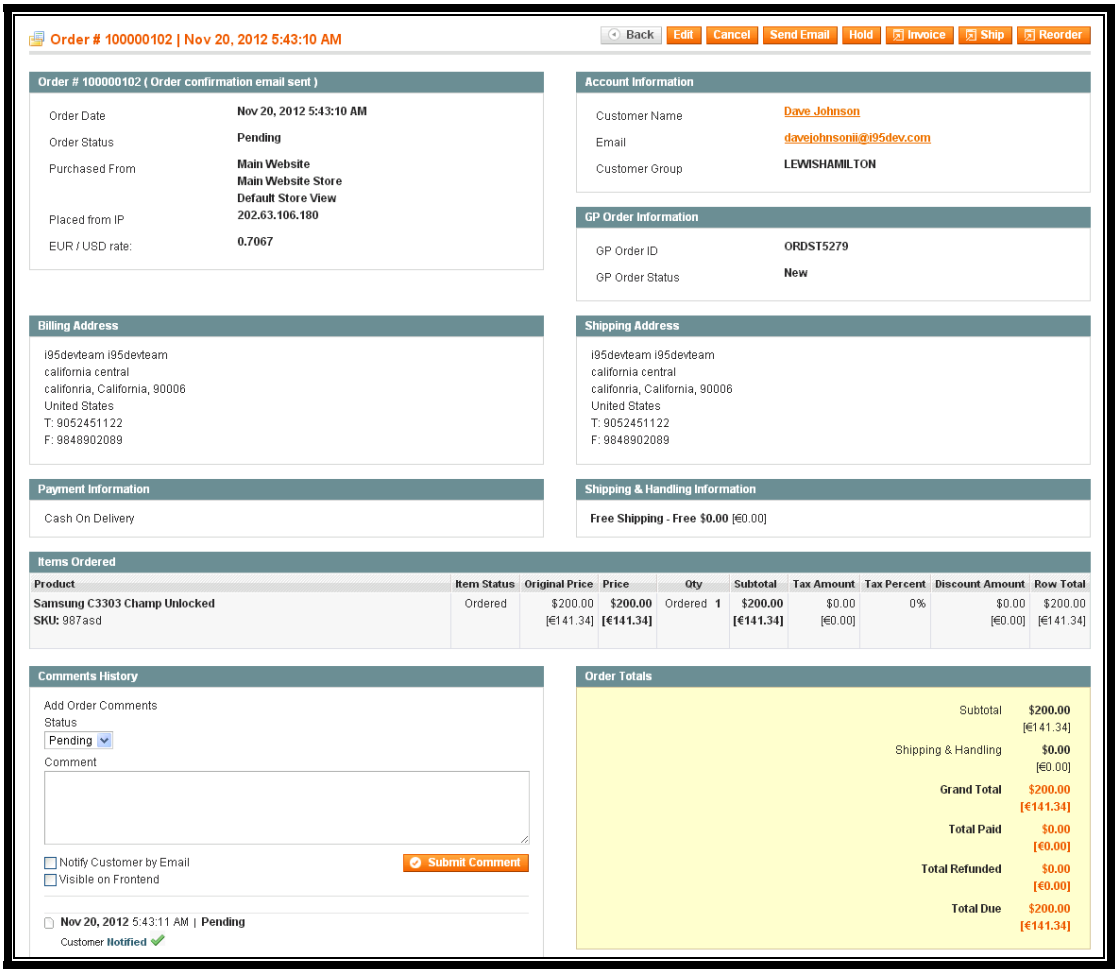


Fig: Order Creation at the Magento Back End with the Specified Currency

In order to check back the **Order Creation** in Dynamics GP that's been done from **Dynamics GP**, Please follow the navigations

Menu Navigation:

- Open **Dynamics GP**
- Navigate to **Sales Card→ Sales Transactions Entry** under **Sales** Section
- Select **Type ID** as **Order**
- Click on **Look Up** button for **Document No**
- Select **Order ID** from look up window
- **Sales Transaction Entry** window gets popped up with Order details in GP as shown in the following figure

- i95Dev GP Connect Extension has the flexibility to submit Order with **New and Existing Customer**

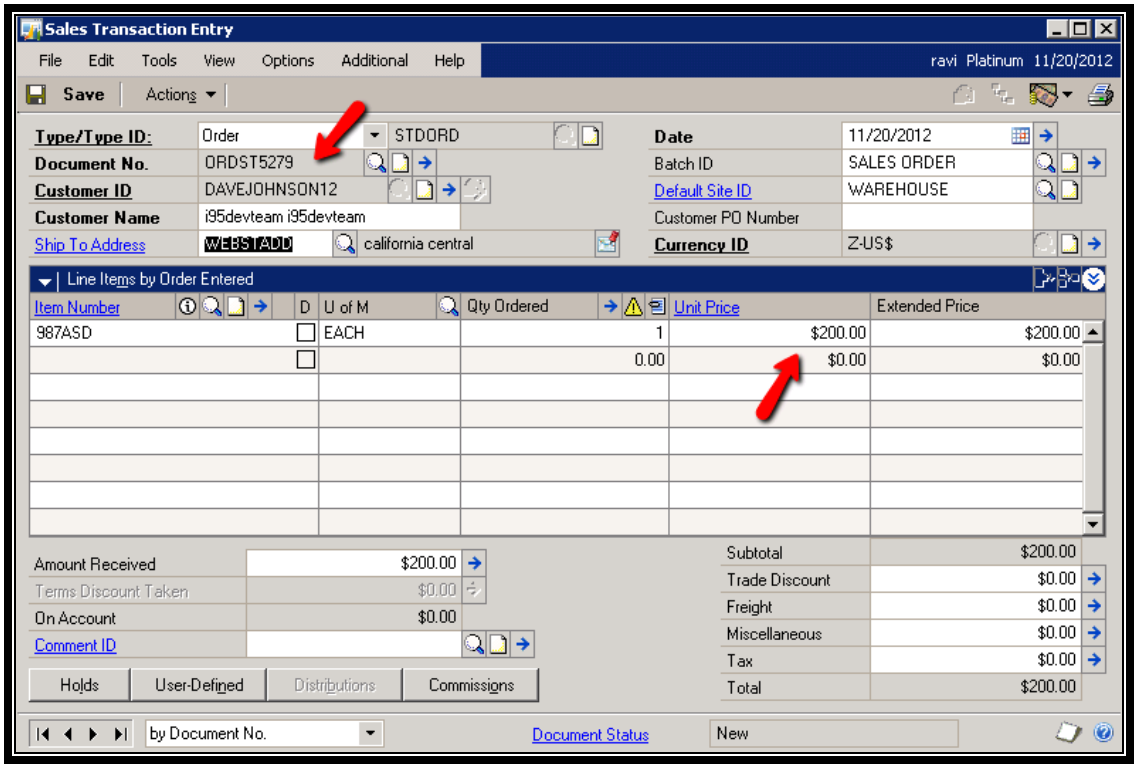


Fig: Order Created in Microsoft Dynamics GP with Base Currency [USD]